Defense Travel System

Deployment Tools
Users Manual

Version 1.0.2

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Revision History

Revision No.	Date	Authorization	Revision/Change Description	Page, Section
1.0	8/04/04	David J. French	Initial DRAFT	All
1.0	8/09/04	David J. French	Second DRAFT	All
1.0.1	4/27/05	David J. French	• Updated Name Routing Lists • Updated Add Routing List Details • Updated Add Conditional Routing Officials • Updated in accordance with DTS Style Guide	Section 1.4.3.1 Section 1.4.3.3 Section 1.4.3.5 All
1.0.1	6/22/05	David J. French	• Removed *Commercial Travel Office (CTO) Validation Guide* from reference list.	Page 5, Section 1.2
1.0.2	8/26/05	David J. French	• Added note per uppercase letters in LOAs (SPR 18097) • Updated screen shot in Attachments (CP 426A) • Updated screen shots and text per NG review	Section 1.4.5 Attachment F All

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1.1 Introduction

The Defense Travel System (DTS) Deployment Tools provide authorized users with an environment in which to enter, validate, and submit all of a site's data for upload into the system. This environment, called Staging, is separate from the live production environment, called Production.

The Deployment Tools support the following creation of the site or org administrative setup data (org structure, routing lists, groups, and lines of accounting [LOAs]). The Deployment Tools also support the initial self-registration of personal data for new travelers.

1.1.1 Site Setup Admin

The Service or Agency Representative (S/A Rep) with permission level 7 accesses the Administrative drop-down list (Figure 1). He or she uses the Site Setup Admin tool to perform the following tasks:

- Establish a site (e.g., Camp Swampy, Virginia)
- Designate the root org(s) at a site
- Identify the Lead Defense Travel Administrator (LDTA) for each root org.

Figure 1: S/A Rep Administrative Drop-Down List

Once the S/A Rep has accomplished the three tasks, the LDTA can log on to DTS from the DTS Home page and access Self-Registration, Site Setup Interview, and Site Setup Admin (Figure 2).

Figure 2: LDTA Administrative Drop-Down List

1.1.2 Site Setup Interview

Site Setup Interview enables the LDTA to coordinate the administrative setup of the site or root org. After the org structure is created, Organizational DTAs (ODTAs) are identified to assist with setup, Routing Officials (ROs) are entered, routing lists are created, groups are named, global group membership rules are created, and LOAs are entered into the Staging environment. Access to Site Setup Interview requires the S/A Rep to designate the site root org LDTA in Site Setup Admin. The LDTA can then designate ODTAs. There is no permission level control on access to Site Setup Interview, which includes two modes: the Interview Mode and the Edit Mode.

The Interview Mode provides a step-by-step process to guide an inexperienced DTA through setup (Figure 3). The DTA is led through administrative setup of orgs, routing lists, groups, and LOAs. Each single step is explained in detail on the screen with links to other documentation.
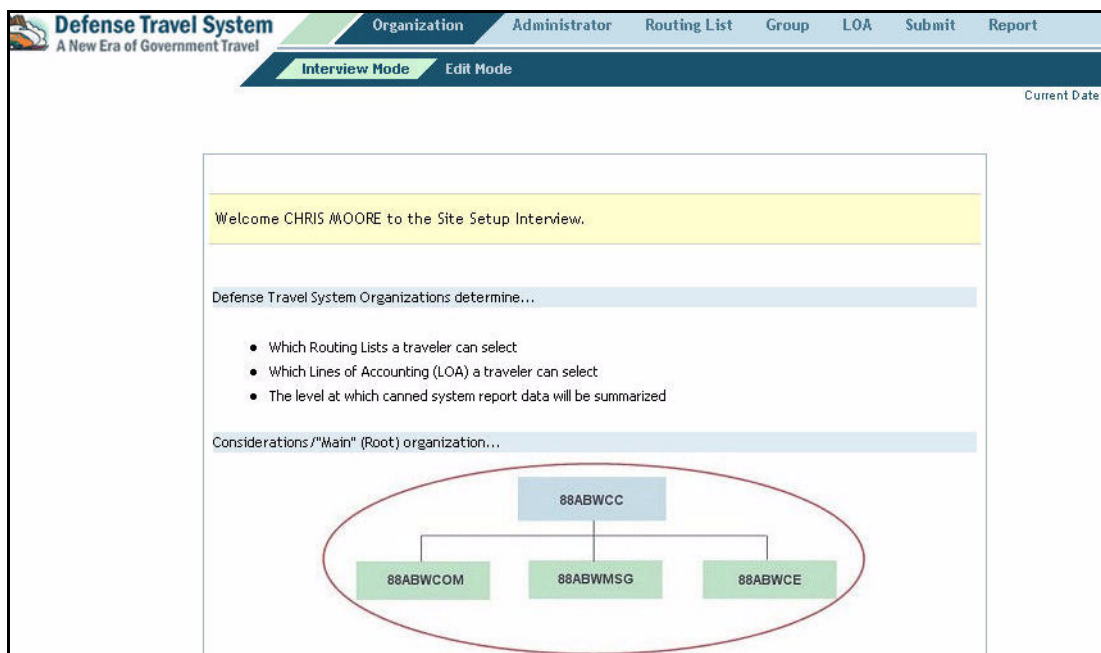
Figure 3: Site Setup Interview Screen

The Edit Mode allows more experienced DTAs to make changes or quickly build structures in a less restrictive manner.

Both modes allow common information for orgs, routing lists, groups, and LOAs to cascade to subordinate orgs (suborgs).

When the site setup administrative data are complete, the LDTA submits the organizations to the S/A Rep. The S/A Rep then reviews and approves the migration of the data into the live Production environment. From then on, all data will be changed by using the DTA Maintenance Tool.

1.1.3 Self-Registration Admin

Self-Registration Admin allows the DTA to assign permissions and org and group access to new DTS users. Access to the Self-Registration Admin Tool is granted to DTAs entered into Site Setup Admin with org privileges. Access to the Self-Registration Admin Tool is also given to Production DTAs with permission level 5 (Figure 4).
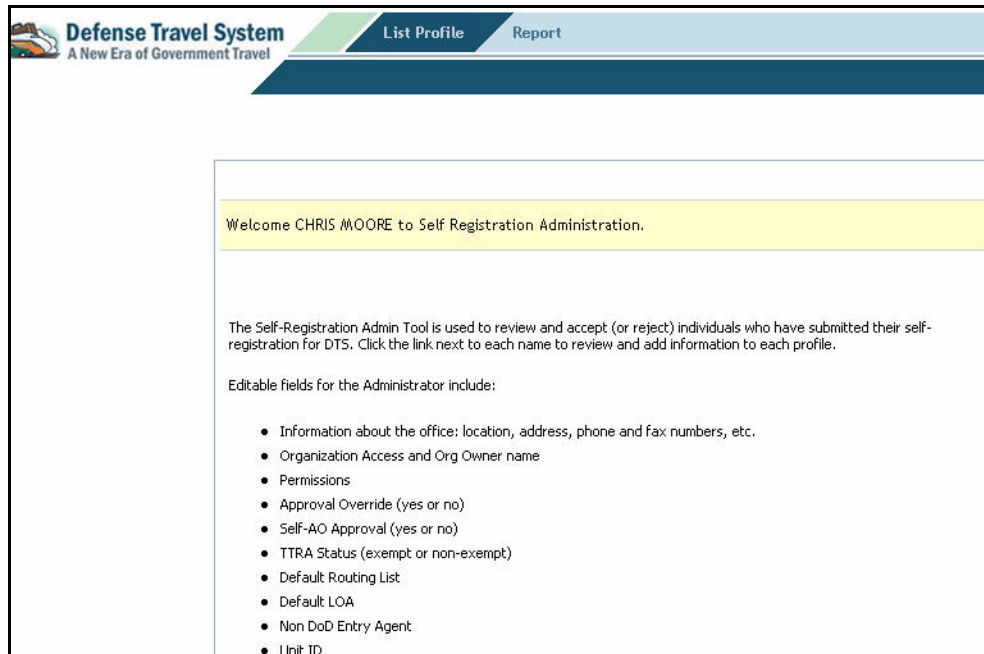
Figure 4: Self-Registration Administration Screen

1.1.4 Self-Registration

DTS Self-Registration enables the DTAs and ROs to be entered into the Deployment Tools for setup to accomplish self-registration. This feature is only available to users entered into Staging with no profile in Production (i.e., DTA Maintenance Tool).

1.1.5 General Fielding Process

All Deployment Tools users should be familiar with the *DTA Users Manual* and should refer to it when questions arise concerning the functionality of DTS. This guide can be downloaded from the following Web site: http://www.defensetravel.osd.mil/dts/site/trainingmanuals.jsp.

The Program Management Office (PMO) Deployment Plan details the general process for Phase II sites – PMO-supported fielding. The LDTA and ODTAs who assist in the process will participate in DTA training for general DTA requirements. This DTA class is scheduled after the Command Visit and before the on-site Business Process (BP) meetings and should enable the LDTA to establish a draft org structure and initial routing lists. The PMO and Northrop Grumman Fielding support the BP meetings on-site. The S/A Rep uses Site Setup Admin to enter the new site, create the root org, and designate the LDTA by the end of the BP meetings. During the week of Extended Support (immediately following BP), Northrop Grumman staff remain on-site to provide guidance in using the Deploy-

ment Tools and assist the LDTA with initial use and setup. On-site support resumes later for a three-week period for validation, live process verification, and customer support. Site support then transitions to the Tier 3 Help Desk (T3HD).

Service or agency guidance should be used for Phase III sites (all others).

The *Deployment Tools Users Manual* is designed to be used by new or inexperienced DTAs. The Deployment Tools Overview (Section 1.2) is a quick guide to the typical process using the Interview Mode. Sections 1.3 through 1.8 provide more detailed procedural guidance for the typical process for the administrative users who will set up orgs in DTS. The final section (Section 1.9) provides an overview of the Edit Mode. Self-Registration and Self-Registration Admin for the new user and for the Production DTA are explained in Sections 1.8.2 and 1.8.3 as postmigration activities.

1.2 Deployment Tools Overview

The following 24 major actions must occur in the Deployment Tools in order to complete the org administrative setup properly. Although there are many possible combinations of steps, and specific service and agency procedures may vary, the following steps will allow users to accomplish Deployment Tools Setup efficiently and effectively (Figure 5).
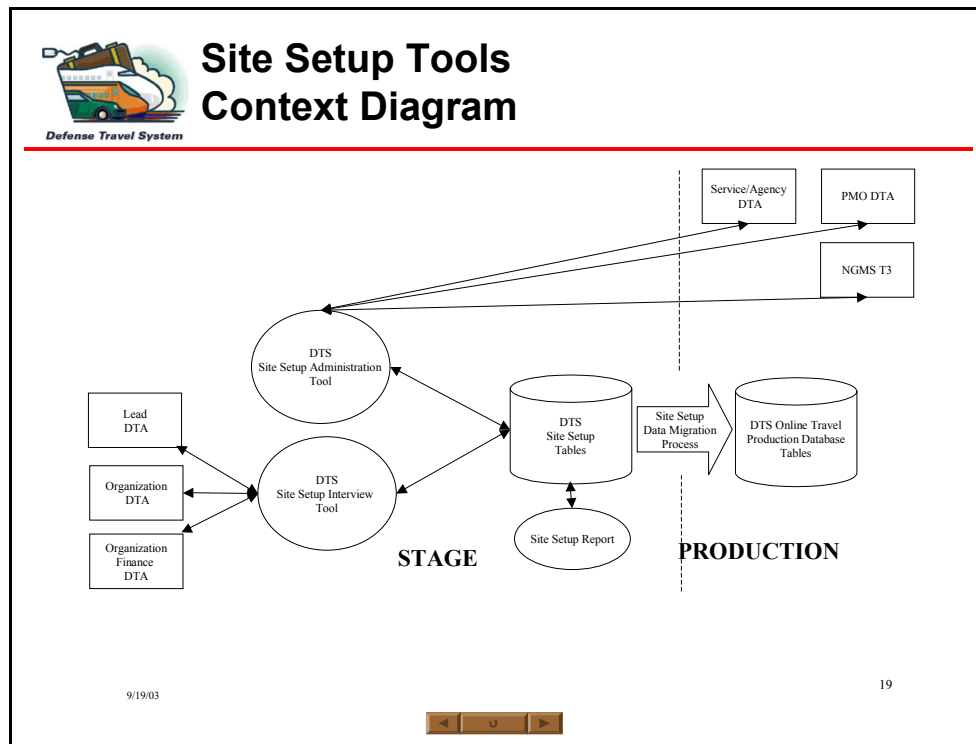
Figure 5: Site Setup Tools Context Diagram

Note: There are many planning and related activities that must occur to bring a site to initial operating capability (IOC). The S/A Rep and LDTA are generally responsible for planning and gathering data in coordination with the PMO and NG Fielders. The PMO Deployment Plan, *DTA Users Manual* (and Appendix S), Site Planning Guide, Site Checklist, and Live Process Verification Plan are all key reference documents.

Initial S/A Representative Actions (Section 1.3)

Note: The numbers in parentheses indicate the sections in this manual that provide more details.

1. Obtain all necessary site and root org data (*DTS Deployment Tool Users Manual,* Attachment A and Attachment B).
2. Create the new site (Section 1.3.1).
3. Create the root org. The process is the same as in the Organizations function of the DTA Maintenance Tool (Section 1.3.2).
4. Create LDTA. The process is the same as creating a user in the People function of the DTA Maintenance Tool. (Section 1.3.3).

LDTA and ODTA Tasks (Permission Level 5 and 6 DTAs) Interview Mode (Section 1.4)

5. Review the Create Organization Worksheet (Attachment C).
6. Create suborgs for root org (Section 1.4.1).
7. Identify ODTAs to assist with setup (Section 1.4.2.1).

   Note: ODTAs can now log on to DTS (Staging only) to assist with their org and suborgs.

8. Name routing lists (Section 1.4.3.1).
9. Add ROs (Section 1.4.3.2).
10. Add routing list details (Section 1.4.3.3).
11. Create groups, group structures, and Global Group Membership Rules (GGMRs) (Section 1.4.4).
12. Create LOAs (Section 1.4.5).
13. Review org setup (Section 1.4.6.1).
14. Complete org setup (Section 1.4.6.2).

Self-Register all Officials Prior to Migration to Production (Section 1.5)

15. LDTA self-registers (Section 1.5.1) and notifies the S/A Rep.
16. S/A Rep accepts LDTA self-registration (Section 1.5.2).
17. The ODTAs and ROs complete self-registration. (Section 1.5.3).

   Note: The ODTAs and ROs should self-register prior to migration of the setup from
   Staging to Production. If not, they are migrated with a user profile and the LDTA
   will have to complete the profile in the DTA Maintenance Tool. The user will have
   to update his or her user preferences.

18. The LDTA accepts self-registration (Section 1.5.4).

Submission (Section 1.6)

19. LDTA submits the org setup to the S/A Rep (Section 1.6.1).

The S/A Rep reviews the submission and approves the setup for migration out of Staging to Production (Section 1.7).

20. S/A Rep reviews the org setup (Section 1.7.1).
21. S/A Rep either approves or rejects the org setup. It must be approved before it can migrate into production (Sections 1.7.2 and 1.7.3).

Post Migration Activities – complete GGMRs, new DTS users can now self-register, and the DTAs can accept the new users into Production (Section 1.8).

22. LDTA completes GGMR for groups belonging to higher-level orgs (Section 1.8.1).
23. New traveler completes self-registration (Section 1.8.2).
24. DTA accepts a new traveler in Self-Registration Admin (Section 1.8.3).

1.3 S/A Rep Initial Tasks (Permission Level 7)

Access to Site Setup Admin is accessible only to users with permission level 7. Site and main (root) org setup and creation of a site's LDTA must be a coordinated effort between the S/A Rep and the site point of contact (POC), usually the LDTA. Setup begins at the service or agency level with the use of Site Setup Admin to enter a site into the site table (New Site). The root (main) org for that service or agency at that site is created, and the S/A Rep assigns the LDTA for that site.

Authorized users (LDTAs) must be assigned by the S/A Rep as the LDTA for a root org. After the LDTA's registration has been accepted, he or she will be permitted to log on to his designated root org in Site Setup Interview. The LDTA may then be able to designate ODTAs and may also start using Site Setup Interview to enter the new site information.

> **Note**: In Site Setup Admin, users are directed to log on to DTS Staging in order to use the Deployment Tools. Other standard DTS capabilities are blocked until the user has self-registered. While the users designated in Site Setup Admin (DTAs) and Interview (ROs and Authorizing Officials [AOs]) have access to the Self-Registration feature, they should not use it until the entire org setup is complete. This would be just prior to migration of the setup data and is explained later in the process (Section 1.5).

The DTS Site Setup must conform to processes identified in the *DTA Users Manual*, Appendix S: Site Admin Setup Planning Process and Templates for DTS. (http://www.defensetravel.osd.mil/dts/site/train-ingmanuals.jsp). Worksheet 5A - Attachment 1 also provides a road map of the data elements for the S/A Reps to use for their initial tasks described below.

> **Note**: The S/A Rep should coordinate the general schedule with the PMO to ensure proper CTO validation scheduling and availability of CTO data elements for initial org creation (refer to Section 1.3.2). T3HD should be aware of the planned IOC date to ensure proper live process verification (LPV) support.

> **Note:** A DTS user can only be designated as the LDTA for one root org at a time.

1.3.1 Create New Site

A site in DTS is a geographic location that identifies a collection of main orgs. A site may consist of orgs from a single service or agency or may consist of many, as in a Joint Command. Typically, this

collection of main orgs would be an installation. Some examples of this include Camp Pendleton, Fort Campbell, Wright-Patterson Air Force Base (AFB), and Norfolk Naval Base (Figure 6).
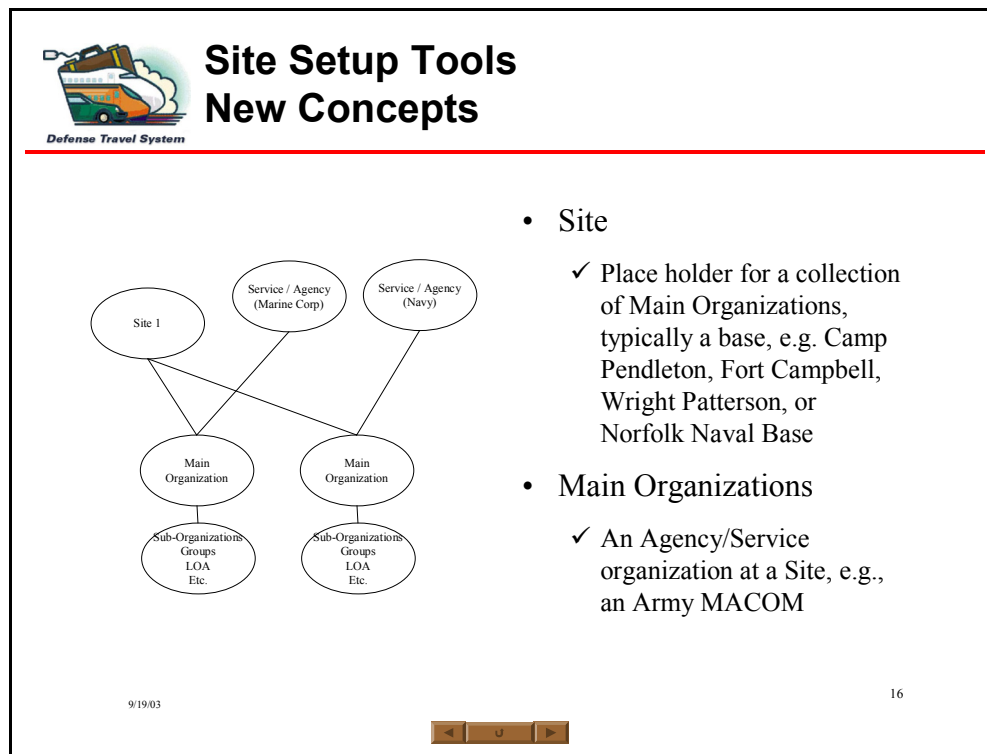
Figure 6: Site Setup Tools New Concepts

As part of the initial setup, the Service or Agency DTAs create all sites in DTS Deployment Tools. Follow the steps below to create a new site in DTS:

1. Complete Attachment A: New Site/Root Organization Worksheet.
2. Complete Attachment C: Root Org Worksheet.
3. Login to your DTS User Welcome screen.
4. Select **Administrative** from the navigation bar.
5. Select **Site Setup Admin** from the drop-down list.

6. If user has access to multiple orgs, click the **Organization** drop-down list to select the appropriate org for setup (Figure 7).
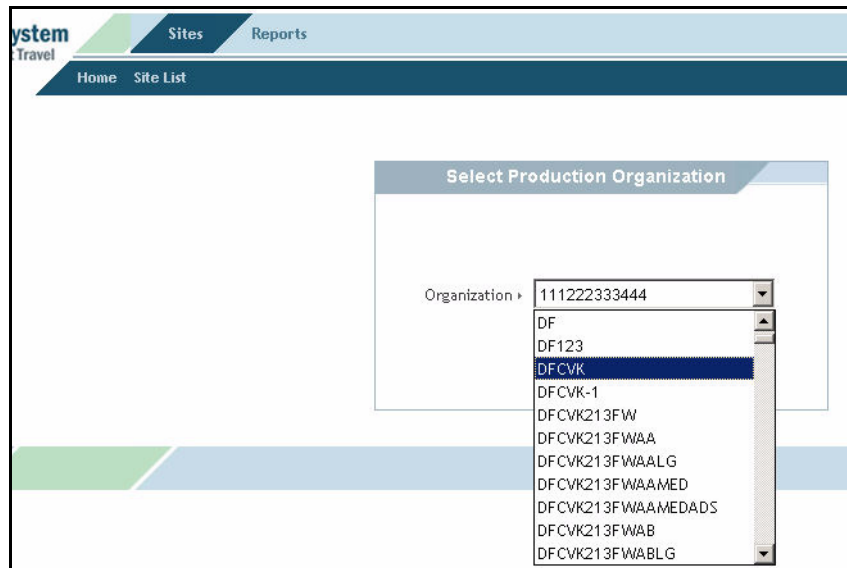
Figure 7: Select Production Organization Screen

7. Review the Deployment Tools process and click **Begin**.

8. Click the **Create New Site** link if the site does not appear in the site list (Figure 8).
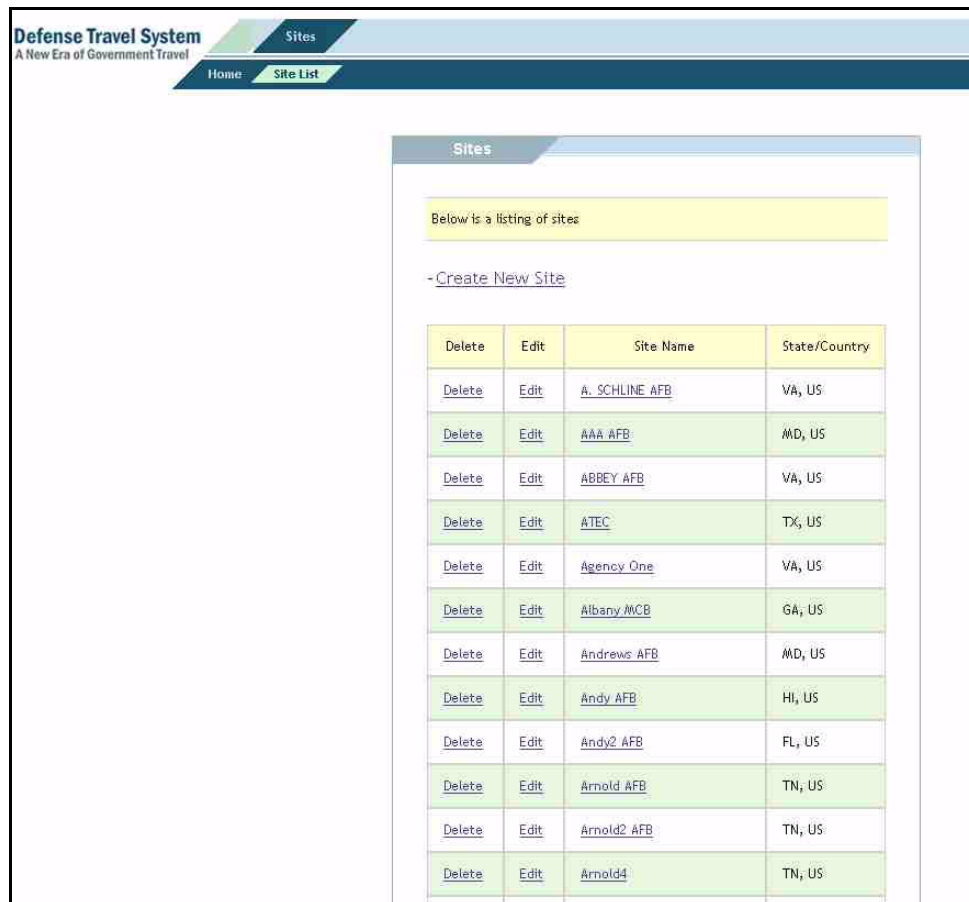
Figure 8: Site List Screen

9. Enter the **Site Name** on the Create New Site screen (Figure 9). Use the information gathered in Attachment A to complete this information.

10. Click the **magnifying glass** icon to select the site **State**.

Figure 9: Create New Site Screen

11. Enter the state postal abbreviation in the **Code** field on the State or Country Search screen (Figure 10).

Figure 10: State or Country Search Screen

12. Click **OK**.
13. Click **Create Site** (Figure 8).
14. Click **Continue**. (To create another site, click the **Yes** radio button before clicking **Continue**) (Figure 11).

Figure 11: Create New Org Screen

> **Note:** Currently, there is no way to edit or delete an incorrect site name. A new site is created.

1.3.2 Create Root Org

The root org is the highest level of an org's DTS naming sequence. The term root org is the same as the main org. A site can contain multiple root or main orgs. The root org is established in DTS at the service or agency level. This is required before LDTA personnel can be assigned. After initial contact and follow-up interview with the site POC, the Service or Agency rep can proceed to create the root org(s) within their org access. Follow the steps below to create a new root org in DTS:

1. Complete Attachment A: New Site/Root Organization Worksheet.
2. Complete Attachment B: Create Organization Worksheet.
3. Login to your DTS User Welcome screen.
4. Select **Administrative** from the navigation bar.
5. Select **Site Setup Admin** from the drop-down list.
6. If you have access to multiple orgs, click the **Organization** drop-down arrow and select the appropriate org for setup.
7. View the Deployment Tools Process and click **Begin** at the bottom of the screen.

8. From the Site List screen, select the site to which the new root org will be added (Figure 12).

Figure 12: Site List Screen

9. Select **Create New Root Organization** if a new root org is necessary for this site (Figure 13). (See step 25 for the Create New Root Organization from Production Organization link).
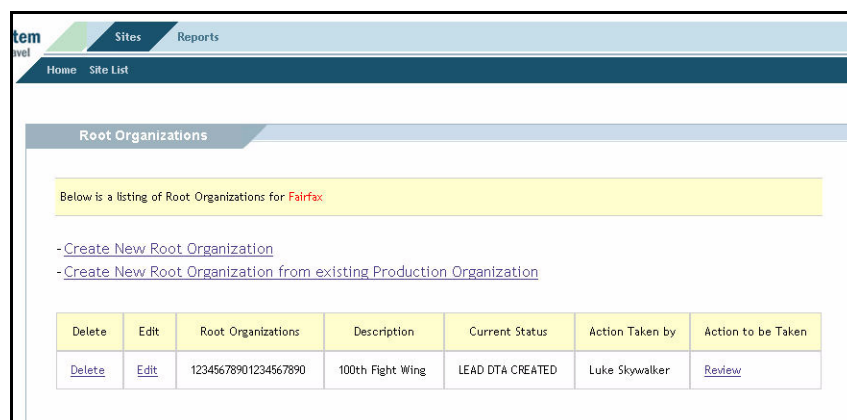

Figure 13: Root Organizations Screen

The next several steps use the information gathered from the completed Attachment B. All fields on the Create Root Organization Screen are recommended (Figure 14). The triangle in the top right corner of a field indicates that the field is mandatory.

Figure 14: Create Root Organization Screen

10. Select the correct value from the **Service/Agency** drop-down list.
11. Enter **DTS Organizational Code**. This is the org name from the org hierarchy naming sequence. (See *DTA Users Manual Appendix Q.*)
12. Enter **DTS Organization Description**. This is the name by which the org is more commonly called.
13. Click the **DTA ID** drop-down list and select the correct value. This is the e-mail address to which the DTS reject notices will be delivered. Click the **magnifying glass** icon to add a new e-mail address to the DTA ID drop-down list.
14. Click the **GDS** drop-down list and select the correct value. Once selected, the **PCC**, **Ticket PCC**, and **Company Code** fields display. Refer to CTO to populate these fields.
15. Enter **Office Address 1**.
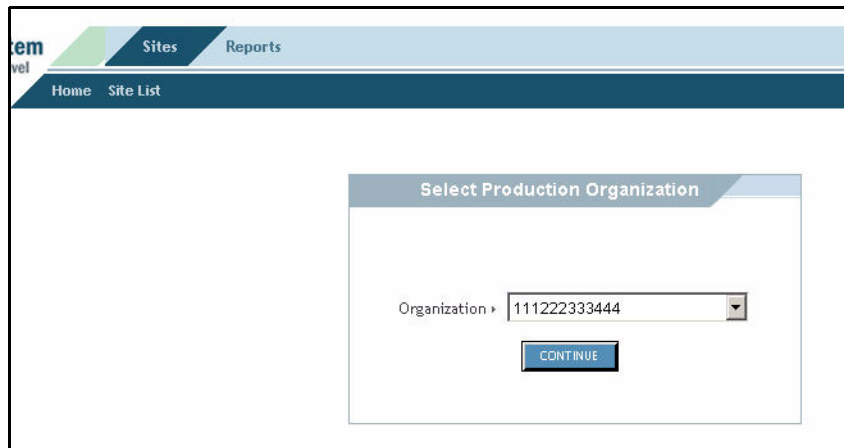
16. Enter **Office City** (Figure 15).

Figure 15: Create Root Organization Screen (Continued)

17. Enter **Office State** by clicking the **magnifying glass** icon and enter the state code.
18. Enter **Office Zip Postal Code**. (This ZIP code must be valid for the city in which the office is located.)
19. Enter **Organization E-mail Address**. This is the e-mail address that will be used by a DTA to approve Self-Registrations when submitted. This e-mail should be an email account that many can access.
20. Enter **Emergency Contact Name**. This contact should be a staff duty office.
21. Enter **Emergency Contact Phone**.
22. Enter **Office Phone**.
23. Enter **Unit ID**. The DTA for each org should know the Unit ID.
24. Click **Save**.
25. Click **Continue**. If you want to create another root org, click the **Yes** radio button before clicking **Continue** (Figure 11).

     Note: The root org is typically a placeholder and no personnel are assigned.

26. Click **Create New Root Organization from existing Production Organization** if a root org has already been created for the site and the data from that org could be used to build the new root org

(Figure 13). This link allows the data that were used to create the chosen Production org to auto-populate into the new root org fields (Figure 16).

Figure 16: Select Production Organization Screen

27. Click the **Organization** drop-down arrow to select the **org** in Production to create the new root org. The drop-down list will be populated based on the user's org access of orgs already in production.

28. Edit the fields that autopopulated, where allowed, and complete the blank fields (Figure 17 and Figure 18).

Figure 17: Create Root Organization Screen

Figure 18: Create Root Organization Screen (Continued)

1.3.2.1 Delete a Root Org

Any elements associated with the org (e.g., orgs, DTAs, users, routing lists, groups, or LOAs) must be deleted before the root org can be deleted. A warning will display on the Delete a Root Organization screen to inform the user if org is associated with any elements (Figure 21).

1. Log into your DTS User **Welcome** screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Admin** from the drop-down list.
4. If you have access to multiple orgs, select the appropriate org from the **Organization** drop-down list.
5. Select **Site List** from the subnavigation bar.

6. Select the site for deletion from the Site Name column (Figure 19).

Figure 19: Site List Screen

7. Select **Delete** to the left of the root org name (Figure 20).
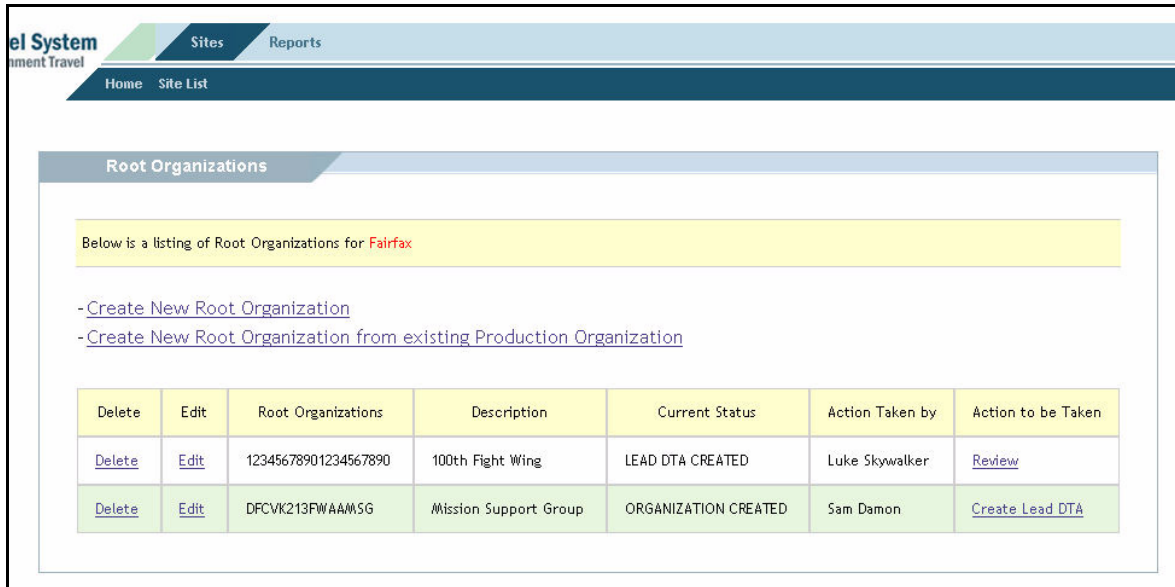
Figure 20: Root Organizations Screen

8. Confirm that the org is the correct one for deletion.

9. Click **Delete**. Any elements associated with the org (e.g., orgs, DTAs, users, routing lists, groups, or LOAs) must be deleted before the org can be deleted. The Delete a Root Organization screen will display a warning to inform the user if the org is associated with any elements (Figure 21).
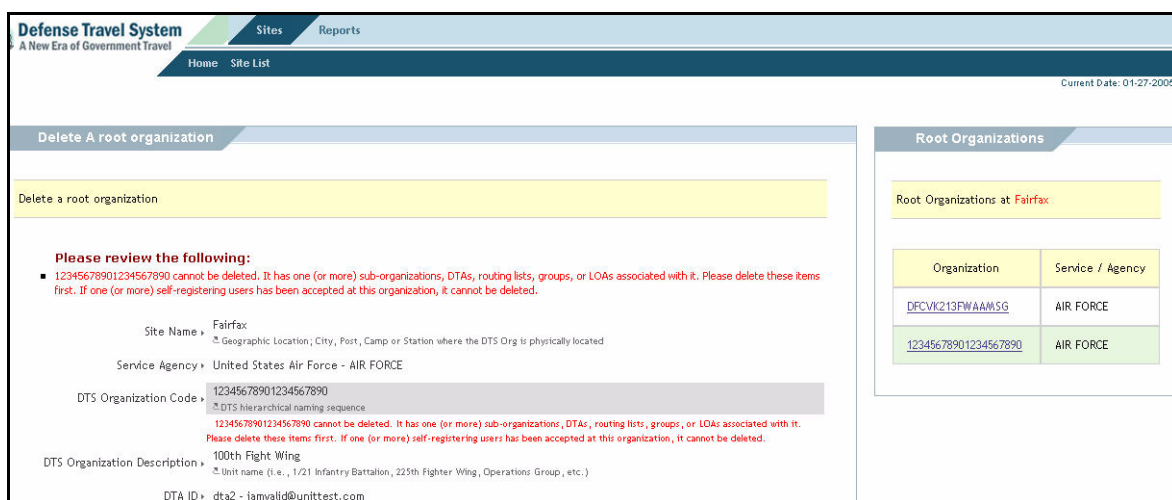
Figure 21: Delete a Root Organization Screen

1.3.2.2 Delete An Org

To delete an org, first open the Site List screen by using the steps presented in Section 1.3.2.1 (Figure 19). Use the following steps to delete an org:

1. Select **Delete** to the left of the site name desired for deletion.
2. Ensure that the correct site is selected for deletion on the Delete A Site (Figure 22) screen.
3. Click **Delete**. Clicking **Cancel** will open the Site List screen with no deletion.
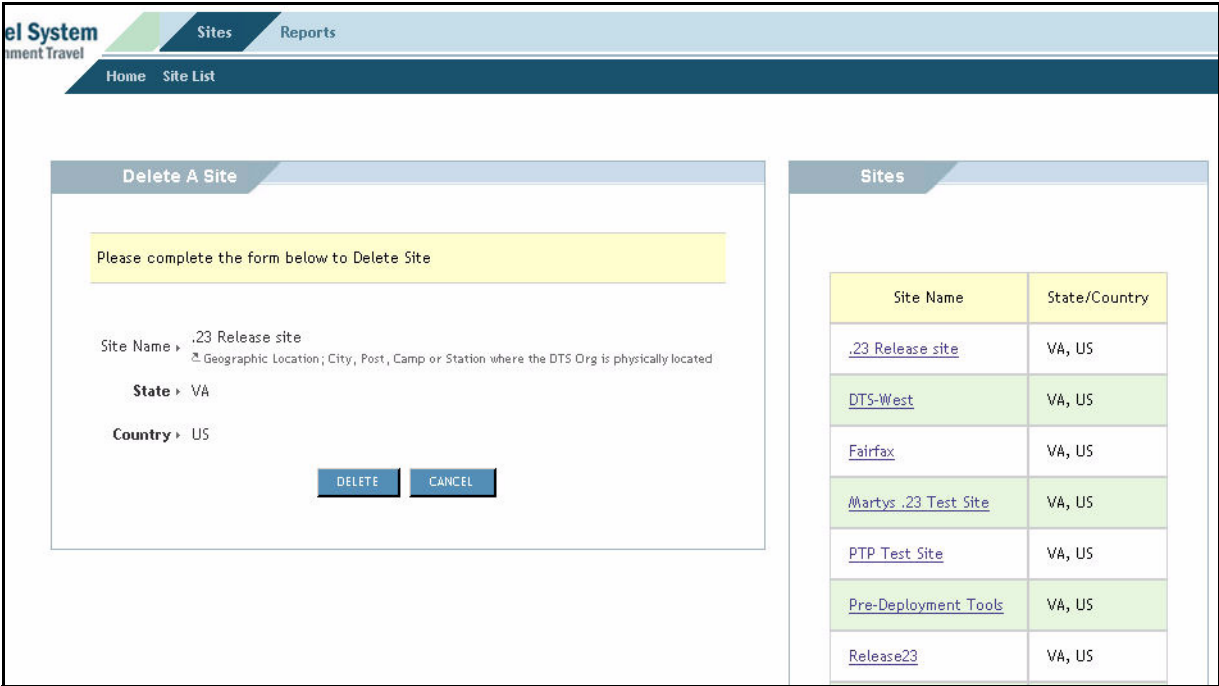
Figure 22: Delete a Site Screen

> **Note**: A site cannot be deleted if a site has one or more orgs associated with it. The site can be deleted once all associations are removed.

1.3.3 Create an LDTA

The LDTA is the primary POC created by the S/A Rep for any given root org. The LDTA may also be responsible for the implementation and administration of DTS. This includes the creation and maintenance of orgs and assignment of ODTAs. They manage the orgs and their routing lists, groups, and LOAs. There may be more than one LDTA designated for a single root org. Follow the steps below to create an LDTA for a root org. Please make sure you have completed Attachment C—New DTA Worksheet before beginning this stage of setup.

1. Complete Attachment C, Part 1.
2. Log into your DTS User Welcome screen.

3. Click the **Administrative** drop-down list and select **Site Setup Admin** (Figure 23).
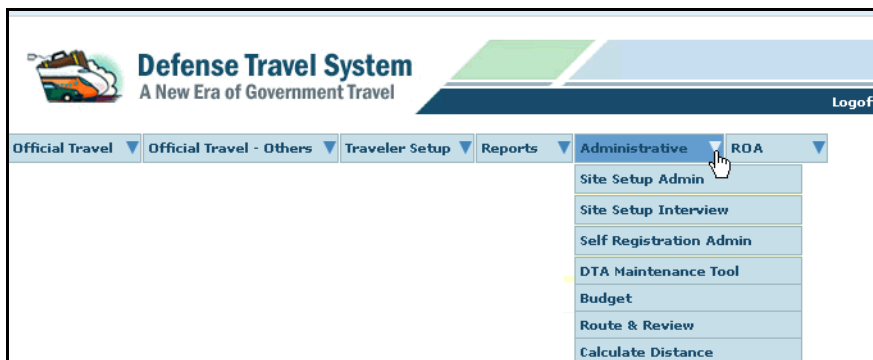
Figure 23: Administrative Drop-Down List

4. Select the Site Name to which the new LDTA will be added.
5. Click the **Create Lead DTA** link under the Action to be Taken column of the Root Organizations screen (Figure 24).
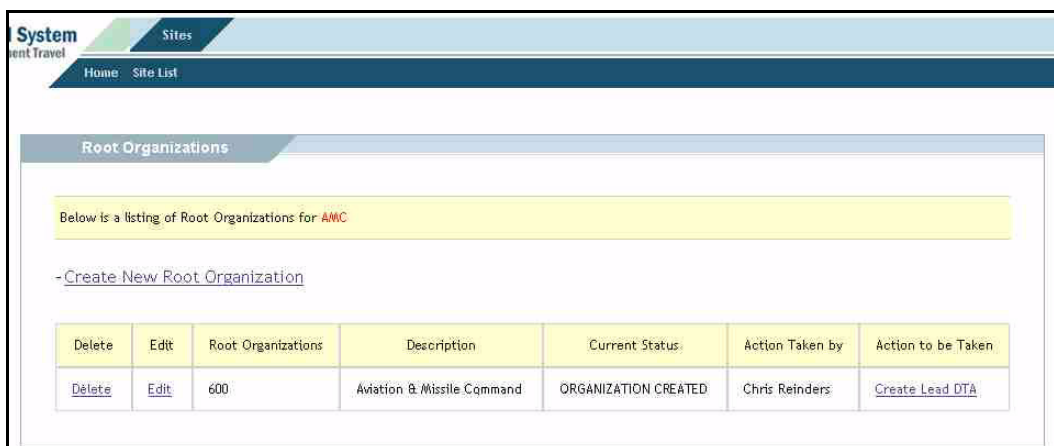
Figure 24: Root Organizations Screen

6. Use the information gathered for Attachment C to enter **Last Name** and **First Name**. The DTA's **e-mail address** is recommended but not required (Figure 25 and Figure 26).

7. If the DTA being created will need to view or edit the orgs, groups, routing lists or LOAs for this org, the **Yes** radio buttons should be selected.

Figure 25: Create LDTA Screen

8. Click **Save**. The Root Org Lead DTA screen opens to confirm that you have created an LDTA (Figure 26). If you want to create another LDTA as an alternate LDTA, click **Yes**.

9. Click **Continue**.

Figure 26: Root Org Lead DTA Screen

Note: The LDTA has access to all Deployment Tools functions – Orgs, Routing Lists, Groups, and LOAs.

10. Inform the LDTA that he or she has been entered into DTS and can begin using the Site Setup Interview Tool. The LDTA should be warned NOT to use any Self-Registration features until setup is complete and ready for submission.

1.4 LDTA and ODTA Tasks (Permission Level 5 and 6 DTAs) – Interview Mode

There are two modes available within Site Setup Interview: the Interview Mode and the Edit Mode. This section describes the Interview Mode. A brief description of the Edit Mode is provided in Section 1.9. Once the S/A Rep has designated an LDTA, the LDTA is notified and can begin site setup using Site Setup Interview to access the Interview Mode. The LDTA should complete the planning steps identified in the *DTA Users Manual* (Appendix S) and other service or agency guidance.

The following is a list of LDTA tasks:

- Review Self-Registration Worksheet (*DTS Deployment Tools Users Manual,* Attachment E)
- Identify and create ODTAs
- Create routing lists
- Identify ROs
- Create routing list details
- Name groups and create GGMRs
- Enter or upload LOAs)
- Review org setup
- Complete org setup

1.4.1 Create Suborgs
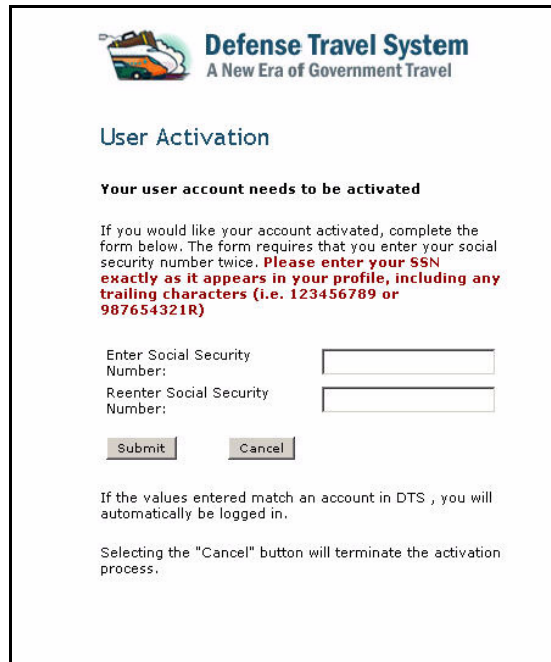
All suborgs will be created based on the naming sequence of the root org. Org structures in DTS will vary and are dependent on the needs of the site. Consult with your Service or Agency DTA and the *DTA Users Manual* Appendix S: Site Admin Setup Process and Templates for DTS for site planning and proper execution. The LDTA may create ODTAs to complete setup for some or all of the suborgs. LDTAs also may serve as ODTAs. This is a point of discussion for the BP meetings for either a Phase II site (PMO-supported) or Phase III (service or agency-supported) site.

Follow the steps below to create a suborg:

1. Complete Attachment B – New Org Worksheet.
2. Log on to DTS.
3. Read the Privacy and Ethics statement and click **Accept**.

If your account has not been activated, the User Activation screen will open (Figure 27). If your account has been activated, your User Welcome screen will open.

4. Complete the two **Social Security Number** fields.

Figure 27: User Activation Screen

5. Click **Submit**. (Self-Registration can occur later in the process.)
6. Click the **Administrative** drop-down list arrow and select **Site Setup Interview** (Figure 28).

Figure 28: LDTA Administrative Drop-Down List

7. Click the **Organization** link in the navigation bar.

8. Select the **org** to be edited. The list includes all orgs to which you have access (Figure 29).
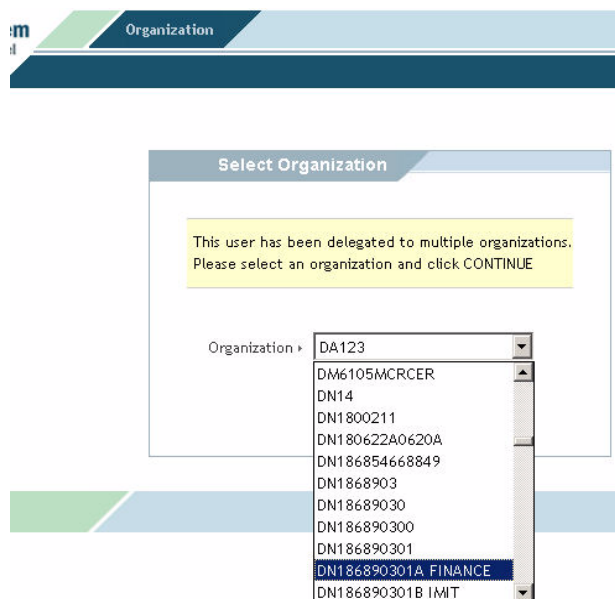
Figure 29: Select Organization Drop-Down List

9. Click **Continue**.
10. Read the overview displayed on the Site Setup Interview screen (Figure 30).

11. Click **Begin** at the bottom of the page.

Figure 30: Site Setup Interview Screen

12. Click the **Yes** radio button to create a new suborg for the org name displayed in red (Figure 31).

Figure 31: Add Subordinate Organization

13. Enter the **DTS Organizational Description**. Use the information from Attachment B to enter the org data. Some of the fields have been prepopulated, based on cascaded data from the root org.
14. Enter the DTS Organizational code. Notice the root org code shown to the left of the field. Add only the code for the suborg (Figure 32).

Figure 32: Create Sub-Organization Screen

15. Update other fields as necessary.
16. Repeat as necessary until all orgs have been added (Figure 33).

Figure 33: Create Another Org Screen

Note: The Site Setup Tool will cycle through each suborg created. The tool will ask user if a new suborg should be added. This will continue until the Site Setup Tool has cycled through all suborgs.

Once the user has finished entering all desired suborgs for the established root org, a Congratulations screen displays to confirm that the user has completed the org structural setup.

1.4.2 Create Other Officials

To be recognized in the Deployment Tools, a designated user in Site Setup Admin must enter data for all users of DTS at his or her site. After creating the orgs, the LDTA then creates other officials necessary to complete the site setup. To enter ODTAs, the LDTA must have org privileges. He or she must have routing list privileges to enter ROs and AOs.

1.4.2.1 Identify ODTAs

The ODTA is the primary POC for suborgs. ODTAs are responsible for the implementation and administration of DTS at their respective levels. This includes creating and maintaining orgs, routing lists, groups and LOAs. The ODTA is charged with identifying ROs, finance and budget officials, and resources that will assist in administering DTS. Use the following steps to create an ODTA for an org:

1. Complete Attachment C: Create New DTA Worksheet
2. Log on your DTS User Welcome Screen.
3. Click the **Administrative** drop-down list arrow.
4. Select **Site Setup Interview**.

5. Select **Administrator** from the navigation bar (Figure 34).
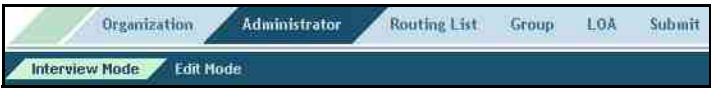
Figure 34: Administrator Navigation

6. Read the overview.
7. Click **Begin**.
8. Select the **Yes** radio button to create a DTA for the selected org. Select **No** to proceed until the desired org is reached. The left side of the screen asks if more DTAs are desired for each org. The right part of the screen displays the names of the DTAs that have already been created for each org (Figure 35).
9. Click **Continue**.
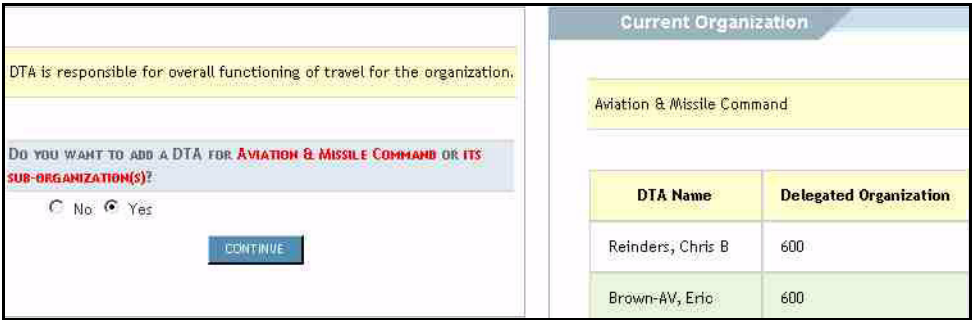
Figure 35: Continue to Add DTA Screen

10. If the **Yes** radio button was selected, the Add screen opens (Figure 36). Complete the SSN field for the selected DTA.

11. Click **Add.**

Figure 36: Add DTA Screen

The screen refreshes. It now displays text fields in which to enter the new ODTA's name, e-mail address and the list of privileges from which to select (Figure 37).

12. Complete the **Name** and **E-mail** fields and assign privileges using the radio buttons. Typically, ODTAs are given privileges for orgs, routing lists, and groups, and the Finance DTA is given permission for LOAs. Use the drop down list next to **Delegated Organization** to place the DTA in the proper org – this allows org access to suborgs in the Deployment Tools Site Setup Interview only.

13. Click **Save**

Figure 37: Add DTA Screen

> **Note:** If the user is already in Production, the personal information will pre-populate.

1.4.3 Create Routing List

Routing lists establish the steps, sequence, and workflow for the electronic processing of travel documents in DTS. Each routing list identifies the signature authority for the review and approval of all authorizations, vouchers from authorizations (vouchers), and local vouchers. Each org must have at least one routing list and may have multiple routing lists.

The Deployment Tool creates routing lists in a three-step process:

Step 1. It prompts the DTA to cycle through each org to create or name as many routing lists as necessary for each org.

Step 2. It cycles through each org to create or add as many ROs as are needed for each org.

Step 3. It cycles through each org to add as many routing list details that are needed for each routing list in each of the orgs.

Refer to Figure 38 for the process flow for completing routing lists in Deployment Tools.

```
┌─────────────────────────────────────────────────────────────────────────────┐
│                                                                               │
│      Step 1                    Step 2                      Step 3             │
│                                                                               │
│  ┌──────────────┐         ┌──────────────┐          ┌──────────────┐         │
│  │ Name Routing │───▶     │ Add ROs for all│───▶    │ Add RL Details│        │
│  │Lists for all Orgs│     │     Orgs      │          │  for all Orgs │        │
│  └──────────────┘         └──────────────┘          └──────────────┘         │
│                                                                               │
└─────────────────────────────────────────────────────────────────────────────┘
```
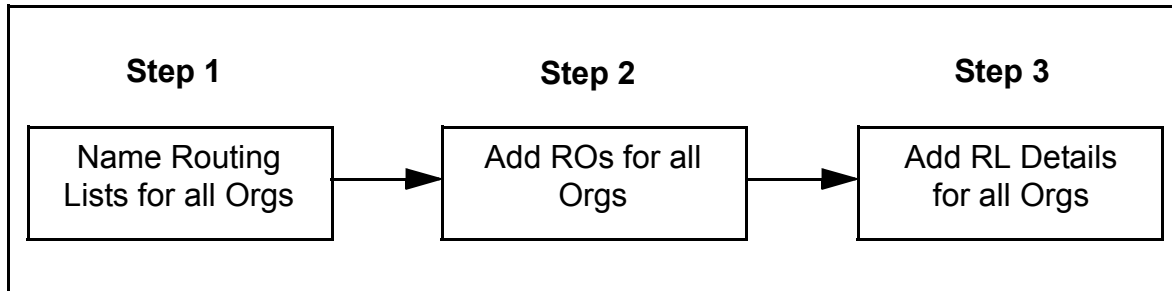
Figure 38: Routing Lists Process Flow

1.4.3.1 Name Routing Lists

The Deployment Tools first prompts the user to name or add each routing list for all orgs created. Use the following steps to name a routing list:

1. Complete the Site Setup Admin Worksheet 2B from Appendix S of the *DTA Users Manual*.
2. Log on to your DTS User Welcome screen.
3. Click the **Administrative** drop-down list arrow and select **Site Setup Interview** (Figure 2).
4. Select **Routing List** from the navigation bar (Figure 39).
5. Read the Routing List Information screen for information and guidance concerning routing lists (Figure 39 and Figure 40). If you would like to upload an electronic version of Worksheet 2B rather than enter the data manually, click the **Routing Lists** link located in the Spreadsheet Templates for Download of this screen. (See Steps 6 and 7 in this sequence.)
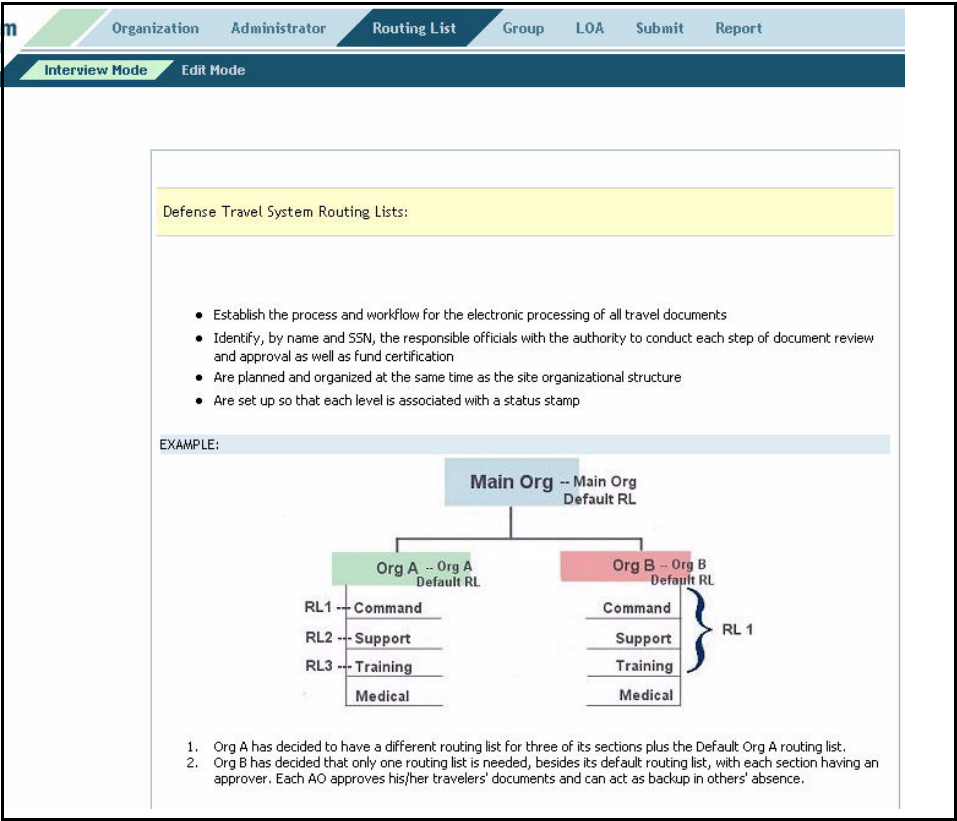
Figure 39: Routing List Information Screen
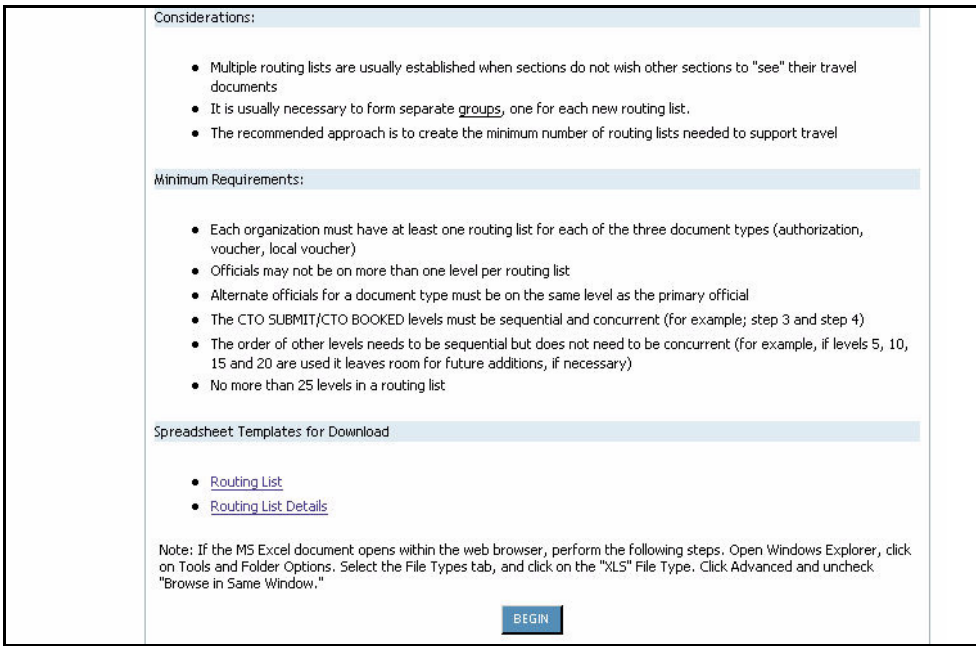
Figure 40: Routing List Information Screen Continued

6. Click **Begin**.
The Upload Routing List(s) screen displays (Figure 41).

7. Click the **Yes** radio button and **Continue** to upload a populated worksheet template to the Deployment Tool. If no upload worksheet exists, select **No** before clicking **Continue** and proceed to Step 10.

Figure 41: Upload Routing List(s) Screen

8. The Upload Routing List File Browse screen displays (Figure 42). Click **Browse** to find and select the saved Routing List worksheet template.

Figure 42: Upload Routing List Browse Screen

9. Click **UPLOAD**. This populates the Deployment Tool with the necessary routing lists.
10. If needed, click the **Yes** radio button to create a routing list for the selected org, or **No** to proceed to the next org until the desired org is displayed (Figure 43).

Figure 43: Create Another Routing List Screen

11. Click **Continue**.
The Site Setup Tool will cycle through each org asking if a new routing list should be added. This will continue until the tool has cycled through all suborgs.

12. If **Yes** was selected, complete the **Routing List Name** field on the Create Routing List screen (Figure 44).

Figure 44: Create Routing List Screen

13. Click the **Yes** radio button to allow the routing list to be automatically copied, and the data to be cascaded to the suborgs already created. Selecting **No** will create this routing list for this org only.
14. Click **Save**.

15. Click **OK** to cycle through to the next org desired to create a routing list, then select the **Yes** radio button.

16. Click **Continue**.

Note: Once routing lists are named, the ROs and routing details are added. The Copy Routing Lists screen opens, enabling the user to copy routing lists from the root org, such as the honor guard, medical, and funeral detail routing lists that may be used in every suborg.

1.4.3.2 Add ROs

Once all routing lists have been created, click **Continue** to add ROs. ROs will be added by name and SSN to DTS and delegated to an org. The Setup Tool will cycle through each org's routing lists to add ROs.

1. Click **Routing List** on the Site Setup Interview navigation bar (Figure 30).
2. Click **Begin**.
3. After you name (create) routing lists for your main org and any subordinate orgs, the screens will ask if you want to add an RO(s) for each routing list. Click **Continue** until the Deployment Tool cycles through all of the routing lists created for each org (Figure 45). The screen asks to Add a Routing List Official for the desired org.

Figure 45: Add Routing List Official Screen

4. If the **Yes** radio button was selected for the question "Do you want to add another Routing List Official", enter the SSN of the RO (Figure 46).

Figure 46: Enter Routing List Official's SSN

5. If this SSN was entered into DTS for the first time, then you will need to complete the **First Name, Last Name**, **E-mail address**, and **Organization** fields (Figure 47).

Figure 47: Add a Routing Official Screen - New SSN

Note: If the SSN is recognized as a valid profile in DTS Production, a screen will display showing that it already exists.

6. Click **Save**.
7. Click **Continue.** The screens will cycle through each of the suborgs. Add ROs for each org as needed.

Once AOs have been added, the screens will cycle again through each of the org's routing lists asking if a Routing List Detail (e.g., a Reviewer) is needed.

1.4.3.3 Add Routing List Details

Routing list details create the order of stamps for each routing list for an authorization, voucher, and local voucher.

After routing lists have been named and the ROs added into the Deployment Tool, the routing list details can be added. AOs, Optional ROs, and Conditional ROs are entered in respective order. Note the following three Deployment Tool steps for adding routing list details:

1. The Deployment Tool cycles through to each org prompting you to add the AOs for each authorization routing list**,** voucher routing list**,** and local voucher routing list for that org. Continue adding as many AOs as are necessary for the orgs' routing lists. Click **Continue** to advance to the next desired org to add AOs.
2. The Deployment Tool then cycles through to each org prompting you to add Optional ROs for each authorization routing list, voucher routing list, and local voucher routing list for that org. Continue adding as many Optional ROs as are necessary for the org. Click **Continue** to advance to the next org to add Optional ROs.
3. Lastly, the Deployment Tool cycles through each org prompting you to add any Conditional ROs for each authorization routing list**,** voucher routing list**,** and local voucher routing list for that org. Continue adding as many Conditional ROs as are necessary for the org. Click **Continue** to advance to the next org to add Conditional ROs.

Note: Optional ROs and Conditional ROs are not required. However, an AO is required for each routing list.

Complete the following steps to add all details to all three routing list types:

1. Complete Site Setup Admin Worksheet 2B from Appendix S.
2. Log on to your DTS User Welcome screen.
3. Click the **Administrative** drop-down list arrow and select **Site Setup Interview**.
4. Select **Routing List** on the navigation bar.
5. Read the Routing List Information screen for information and guidance concerning routing lists (Figure 39 and Figure 40). If you would like to upload an electronic version of Worksheet 2B rather than enter the data manually, click the **Routing Lists** link located in the Spreadsheet Templates for Download of this screen. (See Steps 6 and 7 in this sequence.)

6. Click **Begin**.
    The Upload Routing List screen displays (Figure 48).

7. Select the **Yes** radio button and click **Continue** to upload a populated Routing List Details worksheet template to the Deployment Tool. If no upload worksheet exists for routing list details exists, select **No** before clicking **Continue** and proceed to Step 9.

Figure 48: Upload Routing List(s) Screen

8. The Upload Routing List(s) Detail screen displays (Figure 49). Click **Browse** to find and select the saved routing list worksheet template.
9. Click **UPLOAD**. This populates the routing lists with the routing lists details.

Figure 49: Upload Routing List(s) Detail Screen

10. Click the **Yes** radio button to create Routing List Details for the org displayed on the screen. Selecting **No** proceeds to the next org. You may click **No** until the desired org is reached (Figure 50).

Figure 50: Add An Approval Routing Official Screen

11. Click the **magnifying glass** icon to search for an AO to add to the authorization routing list (Figure 51).
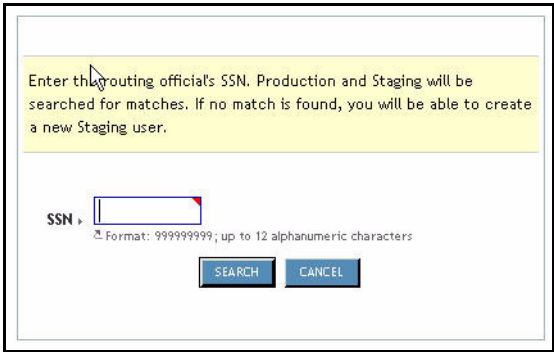
Figure 51: Search for Routing Official Screen

12. Enter the routing official's **SSN**. Click **Search** (Figure 52).

Figure 52: Routing Official Search Screen

13. Click the RO's **first name** on the Routing Official Search Results screen (Figure 53).

Figure 53: Routing Official Search Results

14. Click **Save** to add the selected person to the routing list as an AO (Figure 54).

Figure 54: Save Approving Routing Official Detail

15. Continue selecting AOs for voucher and local voucher until the AOs are complete for the routing lists. After adding AOs for each routing list in the org, advance to the next org by clicking **Continue**.

1.4.3.4 Add Optional ROs

After AOs have been added, the screens will cycle through each routing list asking if an Optional RO (such as a Reviewer) is needed in each of the org's routing lists. When the Add Optional Routing Details screen displays the question: Do You Want to Add Optional Routing Officials for Routing List (*routing list name*) for Authorization? (Figure 55), use the following steps to add optional routing list details:

1. Click **Yes**.

Figure 55: Add Optional Routing Details Screen

2. Click the **magnifying glass** icon to search for the Optional RO.
3. Select the **radio button** to specify the environment (Staging or in Production) in which you want to search for an RO (Figure 52). If you want to search Staging, you may search by either name or SSN. The RO can be found in Production if he or she has self-registered and has been accepted by the LDTA in the Self-Registration Admin Tool.
4. Click the RO's **first name** from the search results (Figure 53).
5. From the Document Status drop-down list select the appropriate stamp for this Optional RO (Figure 56).

Figure 56: Create Routing List Detail Screen

6. Click the **Save** button to add the Optional ROs to the routing list.
7. Continue selecting Optional ROs for voucher and local voucher until the Optional ROs are complete for the routing list. After adding AOs for each routing list in the org, move to the next org by clicking **Continue**.

1.4.3.5 Add Conditional ROs

After Optional ROs are added to each routing list, the screens will cycle through each routing list asking if a Conditional RO (such as a Foreign Travel Reviewer) is needed in each routing list for each org. When the Add Conditional Routing Details screen displays the question: Do You Want to Add Conditional Routing Officials for Routing List (*routing list name*) for Authorization? (Figure 57), use the following steps to add conditional routing list details:

1. Click **Yes**.

Figure 57: Add Conditional Routing List Details Screen

2. Click the **magnifying glass** icon to search for the Conditional RO.
3. Select the **radio button** to specify the environment (Staging or in Production) in which you want to search for an RO (Figure 58). If you want to search Staging, you may search by either name or SSN. The RO can be found in Production if he or she has self-registered and has been accepted by the LDTA in the Self-Registration Admin Tool.

Figure 58: Routing Official Search Environment Selection Screen

4. Click the RO's **first name** from the search results (Figure 56).

A comprehensive view of all routing list details are shown on the Create Routing List Detail screen (Figure 59).

5. Click the **Document Status** drop-down list arrow and select the appropriate **stamp** for this Conditional RO.

Figure 59: Create Routing List Details Screen

6. Click the **Process Name** drop-down list and select the **condition** upon which the document should route to this RO.
7. Click **Save**. You have added the Conditional RO to the routing list.

Continue selecting Conditional ROs for voucher and local voucher until the Conditional ROs are complete for the routing list. After adding all Conditional ROs for each routing list in the org, advance to the next org by clicking **Continue** (Figure 57).

Once routing lists are named, ROs and routing details are added. The Copy Routing Lists screen displays, which allows you to copy routing lists from the root org, such as honor guard, medical, and funeral detail routing lists that may occur in every suborg (Figure 60).

Figure 60: Copy Routing List Screen

1.4.4 Create Groups and Group Structure

The Groups feature in DTS enables local setup to comply with the Privacy Act by limiting access to the personal information contained in travel documents. A group is a list of travelers that have certain commonalities. Access to the group means that designated users have any time access to travel documents for each traveler on the group membership list.

Travelers can be added to individual groups or added to multiple groups simultaneously by using a GGMR for each org. The lists are then updated automatically each time a person is assigned to, received by, or detached from an org. The steps below will guide you through creating groups and group structures for orgs. Make sure that you have completed Site Setup Admin Worksheet 3: Group Structure from Appendix S of the *DTA Users Manual* prior to this stage of setup.

Note: Only one group can be added to an org during the Site Setup Interview. Multiple groups in an org must be created in DTA Maintenance Tool, postmigration.

Note: GGMRs may only be created for groups named within the root org. The group added may serve no level higher than the root org. If groups are needed for groups higher than the root org (e.g., service or agency groups and major command groups), they may be added using the DTA Maintenance Tool, postmigration from Staging to Production. (Section 1.8.1).

Use the following steps to create groups and group structures for orgs:

1. Complete Site Setup Admin Worksheet 3: Group Structure from Appendix S.
2. Log on to your DTS User Welcome screen and access the Site Setup Interview.
3. Select **Group** from the navigation bar at the top of the screen (Figure 3).
4. Read the overview.

5. Click **Begin**.
6. Click the **Yes** radio button to create a group or group structure for the selected org. Select **No** to proceed to the next org until the desired org is reached (Figure 61).

Figure 61: Create a Group Structure Screen

7. Enter the Group Name if a name other than the default name is given (Figure 62).

Figure 62: Parent Org — Group Structure

8. Click the **Yes** radio button to cascade GGMR(s) to lower-level orgs. Click **No** if you do not want to allow lower-level orgs to become members of this group. If the answer to the question is **Yes**, it means that every time an ODTA from a lower-level org creates a group, that ODTA can elect for the members of his or her org to become members of that higher org's group. This will allow that org to be seen by the group at the higher-level org.
9. Click **Save**.

> **Note**: A parent org is any org that has suborgs.

10. Check the **check box(es)** if you want that GGMR to apply to your org. Click the **Yes** radio button to cascade the GGMR(s) to lower-level orgs. Click **No** if you do not want to allow lower-level orgs to become members of this group (Figure 63).

Figure 63: Suborg — Group Structure

11. Click **Save**. The Site Setup Tool will cycle through each org asking if a new group or group structure should be created. This continues until the Deployment Tool has cycled through all suborgs.

1.4.5 Create LOAs

LOAs are established to identify funding for travel. The Deployment Tools provides three ways to generate LOAs for DTS: 1) upload LOAs from an Excel spreadsheet, 2) enter LOAs manually, or 3) copy LOAs to orgs. Follow the steps below to create LOAs for orgs. Please make sure you have completed Site Setup Admin Worksheet 7A: Setup Lines of Accounting from Appendix S of the *DTA Users Manual* prior to beginning this stage of setup.

1.4.5.1 Upload LOAs from Excel spreadsheet

> **Note:** When an LOA is uploaded, created, or copied to an org it also cascades down to copy itself into all of the lower-level orgs.

1. Complete Site Setup Admin Worksheet 7A—Setup Lines of Accounting from Appendix S.
2. Log on to your DTS User Welcome screen.
3. Click the **Administrative** drop-down list arrow and select **Site Setup Interview**.
4. Select **LOA** from the navigation bar (Figure 3).

5. Click the appropriate **link** just above the Begin button on the first LOA screen. This will download a spreadsheet template that is formatted for the selected service or agency (Figure 64).
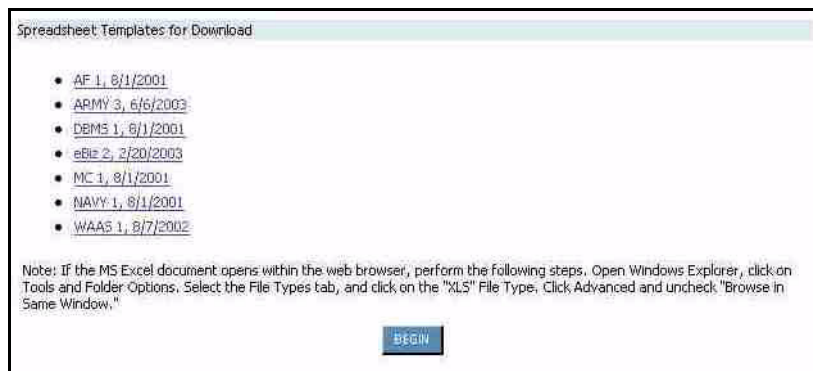
Figure 64: LOA Spreadsheet Templates Screen

6. Save the downloaded template by selecting File > Save As > Browse to save file in an accessible folder.
7. Complete the Excel spreadsheet by entering up to 21 LOAs into the spreadsheet for upload and save the file. Figure 65 shows a spreadsheet template for the U.S. Army.

Note: In the Deployment Tool, LOAs with lowercase letters will not be imported from the worksheet and created LOAs will be forced to uppercase. This is to avoid any mismatched information with GEX or DFAS.

Figure 65: Sample Army Spreadsheet Template Download

8. Select the **Yes** radio button if the LOA data are to be uploaded. Click **Continue** (Figure 66).
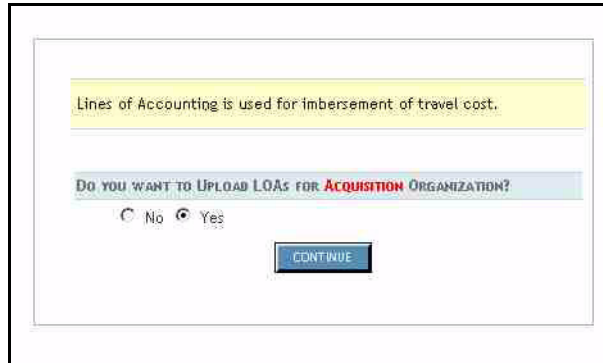
Figure 66: LOA Upload Selection Screen

9. Browse and select the spreadsheet for upload.
10. Select the **No** radio button. The initial LOA screen opens.

1.4.5.2 Manually Enter Each LOA

1. Complete Site Admin Setup Worksheet 7A-Setup Lines of Accounting from Appendix S.
2. Click **Begin** (Figure 67). This will initiate the LOA Interview mode.
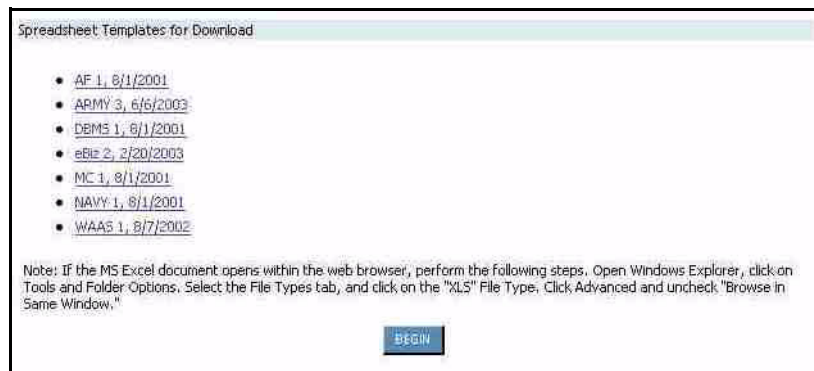
Figure 67: Begin LOA Interview Mode

3. Select **No** to Upload LOAs and click **Continue**.
4. Select the **Yes** radio button to create LOAs (Figure 68).

5.   Click **Continue**.
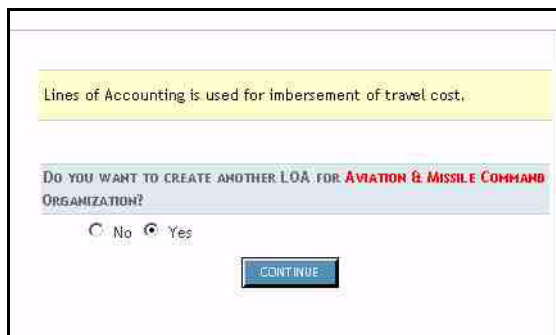
Figure 68: Create LOA Selection Screen

6.   Select the service- or agency-appropriate template from the drop-down list (Figure 69).
7.   Click **Continue**.
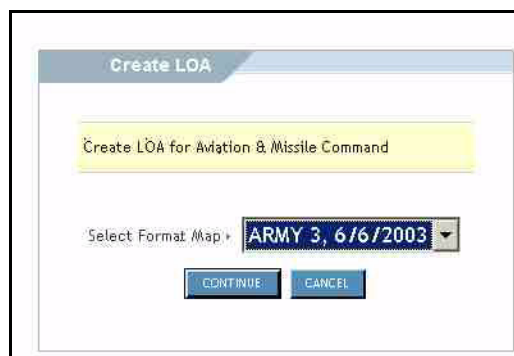
Figure 69: Create LOA Screen

8. Enter all required fields necessary to complete the LOAs (Figure 70).

Figure 70: Army Template To Create LOA Manually

9. Click **Save**.

1.4.5.3 Copy an Existing LOA

1. Complete Site Admin Setup Worksheet 7A—Setup Lines of Accounting from Appendix S.
2. Click the **Administrative** drop-down list arrow and select **Site Setup Interview**
3. Select **LOA** on the navigation bar.

4. Click **Begin** (Figure 71).
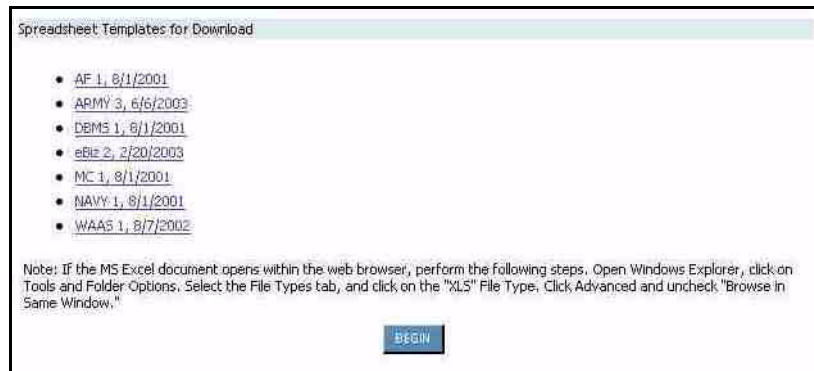
Figure 71: Begin To Copy an LOA

5. Select **No** to upload LOAs. Click **Continue.**
6. Select **No** to create LOAs. Click **Continue.**
7. Select **Yes** to Copy LOAs from the org shown in the screen. Select **No** to proceed to the next org until the desired org is reached. Click **Continue (**Figure 72).
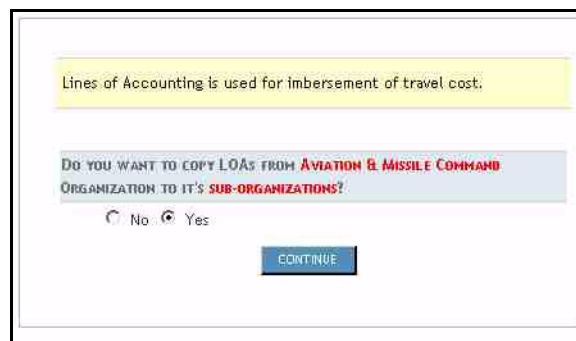
Figure 72: Copy LOAs Screen

8. Select the LOAs that you want to copy (Figure 73).

9. Select the orgs to which the LOAs should be copied.

Figure 73: Copy Selected LOAs to Selected Orgs

10. Click **Copy**.
The Copy LOA Report screen will display how many LOAs were copied, updated, and rejected (Figure 74).

11. Click **Continue**.

12. Select **Yes** to copy LOAs from the org shown on the screen. Select **No** to proceed to the next org until the desired org is reached (Figure 72).

Figure 74: Copy LOA Report

Note: Additionally, when the S/A Rep approves an LOA for migration, a budget shell for the LOA is created in the Budget Admin Tool. Budget targets for each LOA have to be added manually in the Budget Admin Tool.

1.4.6 Review, Complete, and Submit Site Org Setup

Upon completion of the setup of each org, routing list, group, and LOA, the LDTA initiates a Deployment Tools review of the data. The LDTA must review each functional area and stamp it COMPLETE to make the org eligible for submission to the S/A Rep for approval of migration to Production. The Review Org Instructions screen explains this process (Figure 75).
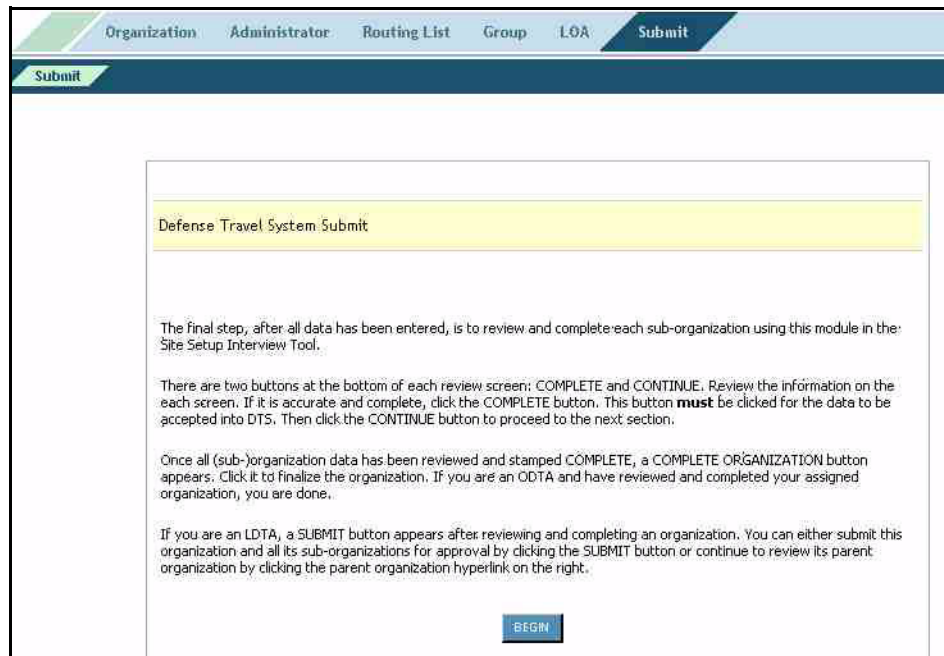
Figure 75: Review Org Instructions Screen

1.4.6.1 Review Org Setup

After the ODTA or LDTA has entered all org data, the LDTA should review the site or org setup data. This review should occur prior to stamping each setup component COMPLETE. The administrative setup data must be reviewed before they can be considered complete. This review can be accomplished in several ways.

Review Method 1: Interview Mode. In Site Setup Interview, the Interview mode provides a step-by-step review process. The LDTA retraces the steps used to create the data, making edits as he or she works through the process (Section 1.4).

Review Method 2: Edit Mode. In Site Setup Interview, the Edit mode provides access to the same data as the Interview mode provides, however, the LDTA may select the data and the order in which to review them (Section 1.9).

Review Method 3: Status View Mode. If the LDTA has on-site support or access to a user with permission level 7, he or she may use the Status View mode to review the data (Section 1.7.1).

The following steps explain the Interview mode of review, in which you will use the Submit process to conduct the high-level review of the org setup.

Note: You will use the same screen to stamp each part (org, routing lists, groups, and LOAs) COMPLETE prior to submission.

1. Log on to your DTS User Welcome screen.
2. Click the **Administrative** drop-down list and select **Site Setup Interview**.
3. Select **Submit** from the navigation bar (Figure 3).
4. Click **Begin** to start the Review process. The first screen is the Review Org Instructions screen (Figure 75).
5. The Org Structure Review screens in the submission process have two sides (Figure 76):
    a. The right side allows navigation through the org structure. It opens to the highest level org designated for the DTA and is indicated by the link to the org name in the middle block, Current Organization**.** The lower block contains links to each of the suborgs. The DTA navigates the org structure by clicking the links to change the current organization. The Parent Organization block above indicates the next higher org and is an active link only if the DTA has org privileges in the Deployment Tools.
    b. The left side is the working space and displays the data that can be reviewed. For the Org structure screen, there is no link to the details of the orgs displayed. The interview or edit modes are used to view the details.

Figure 76: Org Structure Review Screen

6.   The following three buttons are used in the process and become available as needed:
    a. **CONTINUE.** This button advances through the process, changing the screen to display the item for review. The process begins with suborgs, advances to routing lists, then groups, and ends with LOAs.
    b.   **COMPLETE.** This button displays as needed through the process for any data set (suborgs, routing lists, groups, LOAs) not previously stamped complete.
        i. Any DTA can stamp a data set COMPLETE for an org if they were given the privilege when they were entered into Deployment Tools. (Section 1.4.2.1)
        ii. A complete data set indicates that the details are ready for migration. Once all the data sets are complete the org can be submitted to the S/A Rep for migration.
        iii.Any data set stamped COMPLETE cannot be reset or reversed. Any changes made in the Interview or Edit modes are added to the complete data set. This includes changes to the org structure (adding a sub org), changing routing list details or adding a routing list, and similar changes.
    c. **SUBMIT.** This button will display on the Review Org Structure screen if the LDTA is using the Submit process, and all the org's data sets are stamped COMPLETE.

    Note: To edit org data, click the link to the appropriate component on the navigation bar and complete the change in the Interview or Edit mode.

7. Click **CONTINUE** or **COMPLETE** to display the Review Routing Lists screen.

Figure 77: Review Routing Lists Screen

8. The Review Routing Lists screen (Figure 77) is the only screen in the Submit process that displays links on the left side of the screen. Clicking the Details link next to a routing list name will refresh the screen with the appropriate content.
9. Click either **CONTINUE** or **COMPLETE** to display the Review Groups screen.

   Note: The SUBMIT button only displays on the Review Org Structure screen.

10. The Review Groups screen is as shown in Figure 78. This screen to does not allow a view of GGMRs.

Figure 78: Review Groups Screen

11. Click either **CONTINUE** or **COMPLETE** to display the Review LOAs screen (Figure 79).

Figure 79: Review LOAs Screen

12. The LOA labels are displayed for the current org. Click **CONTINUE** or **COMPLETE** to return to the Review Org screen.
13. If all the data sets and all suborg data are also stamped COMPLETE, the SUBMIT button will display. If an org has been reviewed and completed, but its suborgs have not, then that

org will not be available to be submitted (Figure 80). In this case, click the suborgs shown on the right side, and continue the process.

Figure 80: Org Structure Review Not Complete Screen

Once an org's component data set has been clicked COMPLETE, only the CONTINUE button will display afterward. The SUBMIT button only displays when all the org data and suborg data are complete.

1.4.6.2 Complete Org Setup

Follow the steps below to review and stamp the org data COMPLETE.

1.   Log on to your DTS User Welcome screen and access the Site Setup Interview.
2.   Click the **Administrative** drop-down list and select **Site Setup Interview**
3.   Select **Submit** from the navigation bar (Figure 3).
4.   Verify that all the org components have been reviewed (Section 1.4.6.1), are accurate, and have been clicked COMPLETE.

The COMPLETE ORGANIZATION button displays (Figure 81).

5.   Click **COMPLETE ORGANIZATION**.

If you are an ODTA and have reviewed and completed your assigned org, the process is complete. If you are an LDTA reviewing and completing the org data a SUBMIT button will display (Figure 82). Use this button to submit the org data to the S/A Rep.

Figure 81: Complete Organization Screen
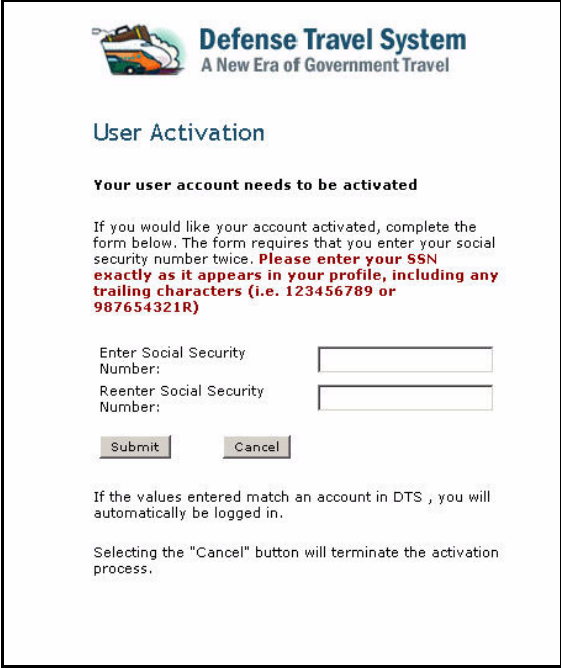
Figure 82: LDTA Submit Screen

1.5 Self-Register All Officials Prior to Migration to Production

The LDTA should self-register after reviewing, completing and submitting the org to the S/A Rep for approval of migration to Production. The self-registration and acceptance of the LDTA, all ODTAs, ROs, and AOs should be complete before the S/A Rep approves the setup migration. This allows the S/A Rep to accept the LDTA in the proper org with org and group accesses, routing list(s) and default LOAs assigned. The LDTA can do the same for ODTAs, ROs, and AOs who then self-register prior to migration approval.

If the LDTA, ODTAs, ROs, and AOs do not self-register prior to migration, they are created in DTS Production with user profiles. Each must be changed manually to travelers and org data completed. The traveler then must complete his or her personal profile when creating his or her first travel document. Delaying self-registration until after migration results in Deployment Tools users losing the efficiencies of self-registration (Figure 83).

Figure 83: User Activation Screen

The following list shows the order of self-registration for all officials:

1. Once the site and org setup is complete, the LDTA self-registers.
2. LDTA notifies the S/A Rep.
3. S/A Rep is established as LDTA for root org.
4. S/A Rep accepts LDTA self-registraton.
5. S/A Rep removed as the LDTA for root org.
6. ODTAs and ROs self-register.
7. LDTA accepts ODTAs' and ROs' self-registration.

   Note: A user who is already registered in DTS enter his or her SSN in the User Activation screen (Figure 69) and clicks **Submit**. The User Welcome screen opens. The user clicks the

Self-Registration drop-down list (Figure 84).
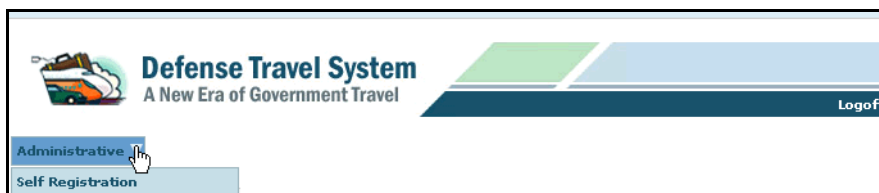
Figure 84: Self-Registration Link

This opens the Self-Registration capability (Figure 85). The user completes the Recommended Information and Preference Information and then clicks the **Self-Registration Submit** link.

Figure 85: Self-Registration Navigation bar

Note: Users who are already registered in DTS enter their SSNs in the User Activation screen and click **Submit**. This opens the User Welcome screen, where the site setup tasks may be continued. These tasks are accessed from the navigation bar.

Users will be notified when the registration has been accepted. They then log on to DTS and continue the Site Setup Admin process (Figure 86).

Figure 86: Administrative Drop-Down List

Note: When accepting a traveler in the Self-Registration Admin Tool, the routing list selection is optional. If the DTA does not designate a routing list, the default routing list will be assigned automatically to the personal profile when the traveler is accepted.

1.5.1 LDTA Self-Registration

To Self-Register, the LDTA will access the Deployment Tools using the drop-down list shown in Figure 87.

Figure 87: LDTA Self-Registration Drop-Down List

1. Refer to the *DTS Deployment Tools Users Manual,* Attachment D: Roadmap for Self-Registration Data and Attachment E: Worksheet for Self-Registration. Prepare your data.
2. Click the **Administrative** drop-down list and select **Self-Registration**. This opens the User Activation screen (Figure 88).
3. Complete the **two** SSN fields.
4. Click **Self-Registration**.

Figure 88: User Activation Screen

Note: This screen displays if a user is already in DTS Production. He or she should

re-enter his or her SSN and click **Submit** to log on for the first time.

Figure 89: Self-Registration Navigation Bar

5. The Self-Registration navigation bar displays (Figure 89). Complete the Recommended and Preference Information. Mandatory fields are indicated by a triangle in the upper right corner. See Attachments D and E for the list of data elements. See Attachment F for screen shots of the data entry screens.
6. Submit the self-registration request and notify the S/A Rep.

     Note: The LDTA can exit from the submission screen without losing data and return at a later time to complete. Also, the LDTA can return to self-registration at anytime to change the submission and resubmit.

1.5.2 S/A Rep Accepts LDTA Self-Registration

An LDTA may not use DTS until the S/A Rep has accepted him or her. The following steps guide an S/A Rep through accepting an LDTA into DTS:

1. Obtain a completed Attachment C: New DTA Worksheet, Part 2 for the LDTA.
2. Click the **Administrative** drop-down list arrow and select the **Self-Registration Admin Tool** (Figure 90).

Figure 90: Administrative Drop-Down List

3. Click **Begin** on the List Profile Screen. The List of User(s) screen opens (Figure 91).
4.   View the names of users who have submitted their self-registrations.

5. Click the numerical designator in the Review column of the user whom you want to review for acceptance.

Figure 91: List of Users Screen

6. Review the populated data fields.

7. Assign permissions, org access, and group access. Selecting a routing list is optional. If no routing list is selected, it will default to the org default routing list at acceptance. Use of a default LOA is optional (Figure 92).

Note: Permission level 7 should not be given to the LDTA.

Figure 92: Accept LDTA Self-Registration Screen

8. Click **Accept** or **Reject**, depending on the completeness and accuracy of the data. The user will receive an e-mail notification of the action taken.

   Note: If you reject the submission, you should enter an explanation into the last block. These comments will be included in the e-mail sent to the user.

1.5.3 ODTA and RO Self-Registration

The LDTA should require all the officials entered into the Deployment Tools to self-register before migration. This allows them to benefit from the efficiency of self-registration and avoid being placed into Production with user/traveler profiles. The LDTA would then have to manually construct traveler profiles using the current process. Use the following steps to self-register:

1. Refer to the *DTS Deployment Tools Users Manual,* Attachment D: Roadmap for Self-Registration Data and Attachment E: Worksheet for Self-Registration. Prepare your data..
2. Log on your DTS User Welcome screen.
3. Click the **Administrative** drop-down list arrow and select the **Self-Registration Admin Tool.** The ODTA has the drop-down list shown in Figure 93. The ROs and AOs have the drop-down list shown in Figure 94.

Figure 93: ODTA Administrative Drop-Down List
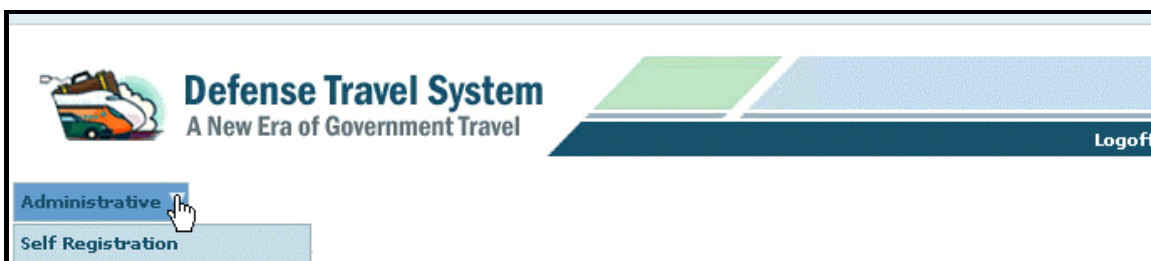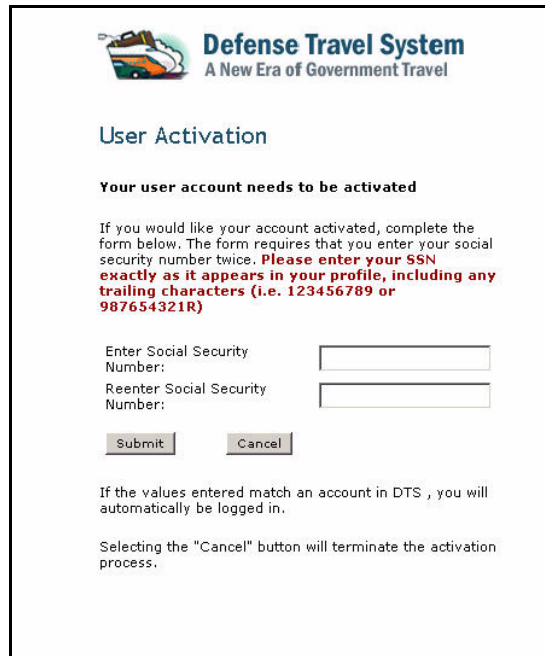
Figure 94: AO and RO Administrative Drop-Down List

This opens the User Activation screen (Figure 95).

4. Complete the two **SSN** fields.

5. Click **Self-Registration**.

Figure 95: User Activation Screen

> **Note:** This screen will display if a user is already registered in DTS Production. The user should re-enter his or her SSN and click **Submit** to log on for the first time.

The Self-Registration navigation bar displays (Figure 96).

6. Complete the Recommended and Preference information. Mandatory fields are indicated by a triangle in the upper right corner. Refer to Attachments D and E for the list of data elements and Attachment F for screen shots of the data entry screens.

Figure 96: Self-Registration Navigation Bar

7. After completion, submit the self-registration request and notify the LDTA that your self-registration is complete.

> **Note:** The user can exit from the submission screen without losing data and return at a later time to complete. Also, the user can return to self-registration at anytime to change the submission and resubmit.

1.5.4 LDTA Accepts Self-Registrations

The LDTA must accept ODTAs, ROs, and AOs before using DTS. Use following steps to accept a self-registered user into the system.

1. Obtain a complete Attachment C: New DTA Worksheet, Part 2 for the self-registrant.
2. Click the **Administrative** drop-down list arrow and select the **Self-Registration Admin Tool** (Figure 97).

Figure 97: Administrative Drop-Down List

3. Click **Begin** on the List Profile Screen. The List of User(s) screen opens (Figure 98).
4. View the names of users who have submitted their self-registrations.
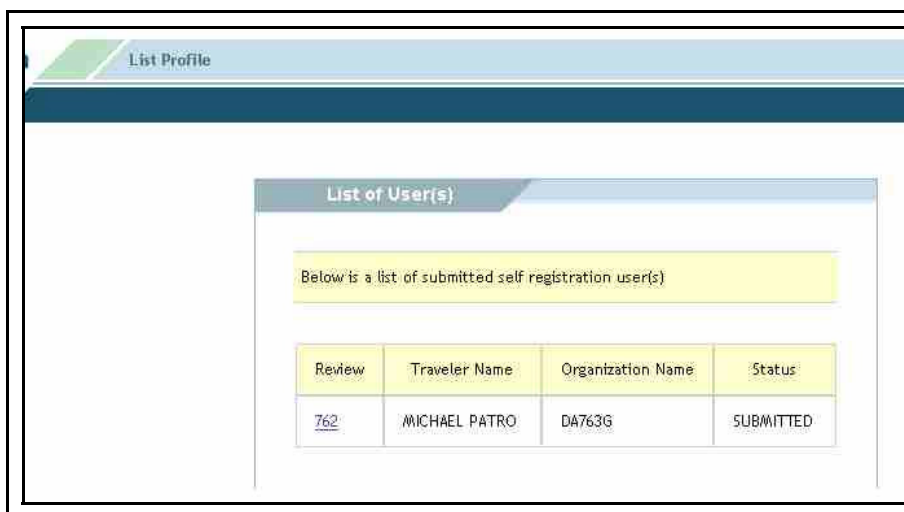
Figure 98: List of Users Screen

5. Click the numerical designator in the Review column of the user whom you want to review for acceptance.
6. Review the populated data fields.

7. Assign permissions, org access, and group access. Selecting a routing list is optional. If no routing list is selected, it will default to the org default routing list at acceptance. Use of a default LOA is optional.
8. Select **Accept** or **Reject** depending on the completeness and accuracy of the data. The user receives an e-mail of the action taken.

> **Note:** If you reject the submission, you should enter an explanation into the last block. These comments will be included in the e-mail sent to the user.

1.6 Submission

If you are an LDTA, a SUBMIT button displays after the org is complete. You can submit this org and all its suborgs for S/A Rep approval (Figure 99).

Figure 99: LDTA's Submit Screen

1.6.1 LDTA Submits Org Site Setup to S/A Rep

The ODTA or LDTA must review all org areas and stamp them COMPLETE in order to make the org eligible for migration (Section 1.4). The LDTA and other officials entered into Deployment Tools self-register and are accepted into Production (Section 1.5). The LDTA may now submit the org setup to the S/A Rep for approval of migration into Production. Follow the steps below to submit the org data to the S/A Rep:

1. Log on to DTS.
2. Access the Site Setup Interview.
3. Select **Submit** (Figure 3).
4. Review the information on each screen.
5. Click **COMPLETE** if all information is accurate and complete.
After all org data have been reviewed and stamped COMPLETE, a COMPLETE ORGANIZATION button displays.

6. Click **COMPLETE ORGANIZATION**.

If you are an ODTA and have reviewed and completed your assigned org, the process is complete (Figure 100).

Figure 100: Complete Organization Screen

If you are an LDTA, a SUBMIT button displays after you have reviewed and completed an org. You can submit this org and all its suborgs for S/A Rep approval (Figure 101).

Figure 101: LDTA Submit Screen

Note: After submitting your org setup data all data changes are accomplished in the DTA Maintenance Tool.

1.7 S/A Rep Review and Approve Org Setup

1.7.1 Review Org Setup

1.7.1.1 S/A Review of Setup

After the LDTA and ODTAs have entered and reviewed their org setup (Section 1.4.6) and all components have been stamped COMPLETE, he or she clicks the SUBMIT button. This sends the data to the S/A Rep, who does a final review. The representative uses the status view to check the submission for policy and requirements. The S/A Rep can click on each link to see the underlying information – each org's data, routing list details, group structure, and LOAs.

1. S/A Rep logs on to DTS and accesses the Site Setup Admin Tool.
2. Click the site name hyperlink from the Site List of the org being reviewed.
3. Click the **Review and Approve** link (Figure 102).

Figure 102: S/A Rep Review and Approve Link

1.7.2 Approve Organization Setup

Once the LDTA has reviewed and completed their information they will click the Complete Organization button to submit their data to the S/A Rep for Review and Approval. The following steps outline the S/A Reps' Review and Approval process.

1. S/A Rep logs on to the Site Setup Admin.
2. Select the **Site List** link on the top navigation bar.

3. Select the Name of the site (Figure 103).

Figure 103: Site List

4. Select the **Review** link or the **Review and Approve** link (Figure 104).

Figure 104: Review and Approve

5. Review the Orgs, DTAs, Routing Lists, Groups, and LOA by clicking the various links (Figure 105).

Figure 105: Review Orgs, DTAs, Routing Lists, Groups, and LOA

6. The **Reject** button at the bottom of the screen will return the submitted data back to the LDTA with the option to type comments in the text box. If the data appear to be complete and accurate, click the **Approve** button (Figure 106).

Figure 106: Approve, Reject, Cancel

7. If there are problems with the data, the areas that are hindering the approval process will be listed as links (Figure 107).

Figure 107: Data Approval

8. Select the org name link on the left to show the org data in the org summary on the right to see why it is not approving (Figure 108).

Figure 108: Org Name Link

With the approved migration to Production, the LDTA and ODTAs use the regular DTA Maintenance for all subsequent changes. For more information on using the *DTS DTA Manual,* visit the Web site at http://www.defensetravel.osd.mil/dts/site/trainingmanuals.jsp.

> **Note**: After approval there can be a delay in the database until the migrated data appear in Production. This delay can be as long as several hours depending on the workload on the data center servers.

1.7.3 Service or Agency Rejection of Org Setup

If the submission is not acceptable to the S/A Rep, he or she can reject the org data. The LDTA will be notified via e-mail. The S/A Rep should reject the parent and all suborgs. He or she must not accept some suborgs and not all. For a later submission, he or she will not be able to reject the parent if one or more suborgs have been approved for migration into production. The S/A Rep should work closely with the LDTA to resolve the problems.

1.8 Postmigration Activities

Once the data have migrated to Production, DTAs can complete higher-level GGMRs in the DTA Mainte-nance Tool. New DTS users can now self-register, and the DTAs can accept the new users into Production. Additionally, any changes to the org setup can be made in the DTA Maintenance Tool (Figure 109).

Figure 109: DTS DTA Maintenance Tool Home Page

1.8.1 LDTA Completes GGMRs for Higher-Level Groups

Only one group can be added to an org during the Site Setup Interview process. The group named for a specific org cannot be added to a GGMR for that specific org (SPR 11046). The group added to GGMR may only go as high as the root org. Groups are added using the DTA Maintenance Tool after data migration from Staging to Production.

> **Note**: See Chapter 6 of the *DTA Users Manual* for more information about groups and GGMRs. This document is accessible through the following URL: http://www.defensetravel.osd.mil/dts/site/trainingmanuals.jsp.

1.8.1.1 Add Groups Belonging to Higher-Level Orgs

The LDTA also needs to add any groups belonging to higher-level orgs to each GGMR.

GGMRs may only be created for groups named within the root org. The group added may only go as high as the root org. If groups are needed above the root org (such as service or agency groups and major command groups), they may be added using the DTA Maintenance Tool postmigration from Staging to Production.

1.8.2 New Traveler Self-Registration

Each user in DTS must self-register in the Setup Tool. Before starting, the traveler has to have a public key infrastructure (PKI) certificate, access to the DTS Home page, and know the name of his or her service or agency, state, site, and org. This information should be provided by the DTA. Beginning on the DTS Home page, use the following steps to register:

1. Click **Login**.
2. Read the Ethics and Privacy statement.
3. Click **Accept**.
4. Enter the user's SSN twice.
5. If the user has not used DTS before, the user clicks on the **Self-Registration** drop-down link (Figure 2).

> **Note:** This screen will display if a user is already in DTS Production. The user should re-enter his or her SSN and click Submit to log on for the first time (Figure 110).
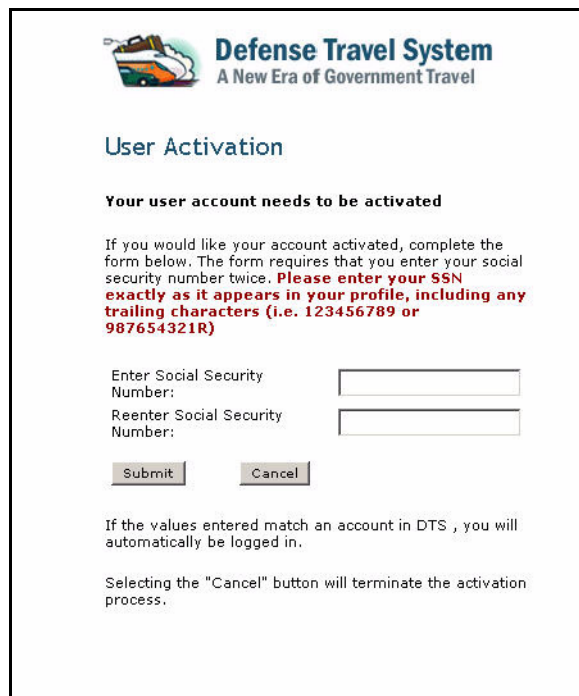
Figure 110: User Activation Screen

6. From the Administrative drop-down list select **Self-Registration** (Figure 111).
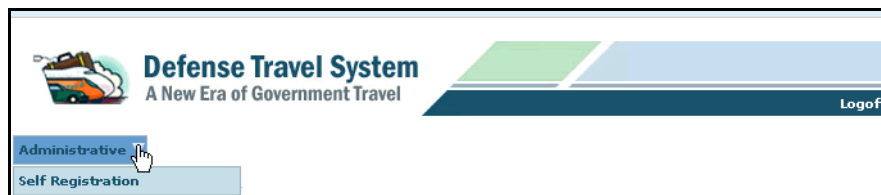
Figure 111: User Self-Registration menu

7. The Self-Registration navigation bar displays. Enter the Recommended and Preference information. Mandatory fields are indicated by a triangle in the upper right corner. Refer to Attachments D and E for the list of data elements and Attachment F for screen shots of the data entry screens (Figure 112).

Figure 112: User Self-Registration Navigation Bar

8. After completion, submit the self-registration request and notify the LDTA that your self-registration is complete.

    Note: The user can exit from the submission screen without losing data and return at a later time to complete. Also, the user can return to self-registration at anytime to change the submission and resubmit.

9. After completion, users click **Self-Registration Submit** (Figure 3). The DTA for the org selected during self-registration receives an e-mail of a self-registration awaiting action. Users will be notified when the registration has been accepted or rejected. They then log on to DTS and conduct travel.

    Note: DTS travelers use self-registration. DTAs continue to have to manually input personnel that are only "users" and do not travel. This is done in DTA Maintenance.

1.8.3 DTA Accepts New User Self-Registration

After a traveler self-registers, the DTA must accept them before they are able to do any travel in the DTS system. The following steps show how a DTA accepts a user into the system.

1. DTA logs on to the Self-Registration Admin (Figure 113).

Figure 113: Self-Registration Admin Tool

2. Click **Begin** on the List Profile Screen.
3. View the list of users who have submitted their self-registrations and are awaiting approval.
4. Click the blue numerical designator in the Review column of the person you want to Review/ Accept (Figure 114).
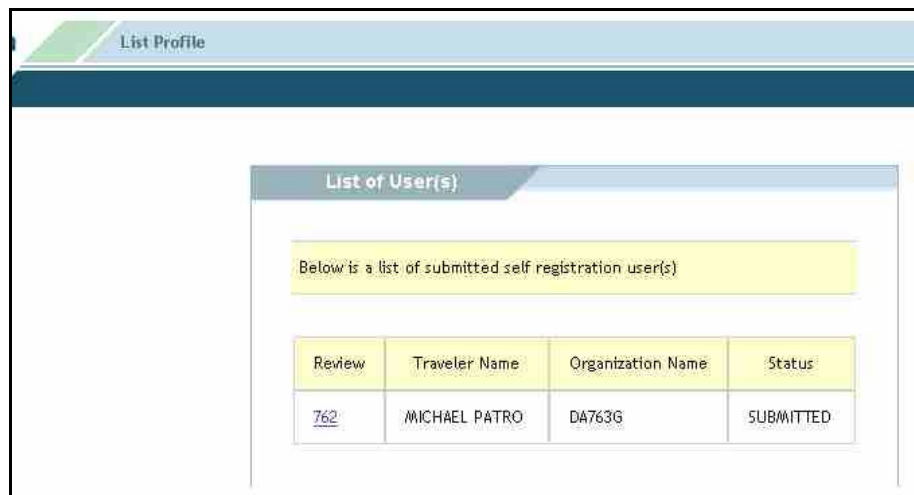
Figure 114: List of Users

5. Review the populated data and you must assign permissions, org-access, and group access. Selecting a routing list is optional, as it will default to the org default routing list at acceptance. Use of a default LOA is optional also.
6. Select **Accept** or **Reject** depending on the completeness and accuracy of the data. The user receives an e-mail of the action taken.

> **Note:** If you reject the submission, you should enter an explanation into the last block. These comments will be included in the e-mail sent to the user (Figure 115).

Figure 115: Review User to Accept or Reject Profile Data

1.9 Edit Mode

The Edit Mode allows the more experienced DTA to make changes to the structure built in the Interview Mode. Additionally, a DTA can quickly build structures in a less restrictive manner than the Interview Mode (Section 1.4). At any point in the edit process, orgs, routing lists, groups, and LOA can be added, edited, or deleted without using the procedural order of the interview mode process. However, the cascading of information feature in the Interview Mode is not available in the Edit Mode.

1.9.1 Orgs

1. Log on to **DTS**. From your User Welcome screen, select **Site Setup Interview** from the Registration drop-down list (Figure 116).

Figure 116: DTA Administrative Menu

2. Click **Edit Mode** under Organizations.   Figure 117 shows the options for Organizations in the Edit Mode.
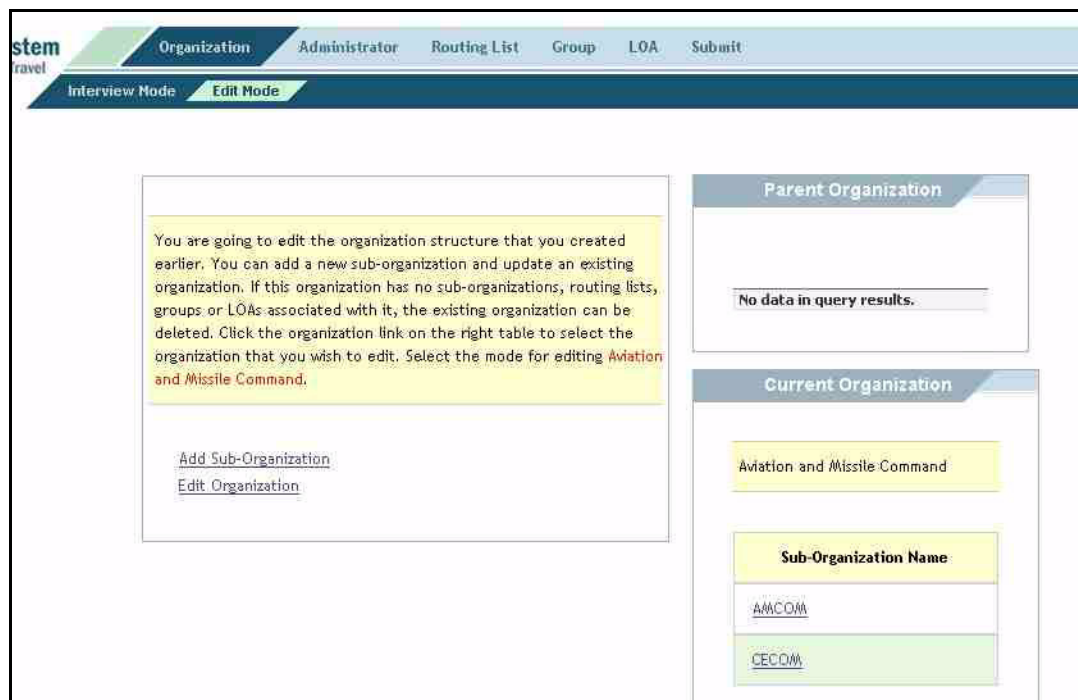
Figure 117: Edit Mode – Organization Functions

The screens in **Edit Mode** have two major parts:

a. The right side allows navigation through the org structure. The screen opens displaying the highest-level org designated for the DTA and is indicated by the link to the org name in the middle block, "Current Organization." The lower block contains links to each of the suborgs. The DTA navigates the org structure by clicking the links to change the "current

organization." The Parent Organization block above indicates the next higher org and is an active link if the DTA has org privileges in the Deployment Tool.

b. The left is the working space and displays the data that is available. In this case there are two selections; Add a suborg, or Edit the current organization

1.9.1.1 Add Suborgs

1. Use Attachment B – Create a New Organization Worksheet to gather the appropriate information.
2. Click **Add Sub-Organization** (Figure 118 and Figure 119 show the data needed to add a Sub-Organization.)
3. Enter the **Organizational Code** (For example, 620). This is the Org naming structure as determined by the LDTA.
4. Enter the **Organization Description** (for example, CECOM or name in which org is recognized).
5. Edit org information in the remaining fields.
6. Click **Save**.

Note: The left working area of the screen is layout the same as the Interview Mode screens and DTA Maintenance screens for creating an org. Mandatory fields are indicated with a triangle in the upper right corner of the data entry box.

Figure 118: Edit Mode – Add New Organization

Figure 119: Edit Mode – Add New Organization (continued)

Note: Unlike the Interview Mode, the DTA is not given the option to cascade the common data to subsequently added suborgs in the Edit Mode. The DTA could return to the Interview Mode to indicate using the data in suborgs, and create them there (Section 1.3.1).

1.9.1.2 Edit An Organization

If you choose to edit an existing suborg, the screen is the same for the org data, however you cannot change the org name.

1. Log on to Site Setup Interview.
2. Click **Edit Mode** from the submenu of the navigation bar (under Organizations)
3. From the right of the screen select the org that you want to edit from the *Current Organization* box. If a lower-level org is not shown select its parent org to display its suborgs (Figure 120).

Figure 120: Edit Mode – Edit Existing Organization

4. Make the necessary edits from the fields displayed (Figure 121).

Figure 121: Edit Mode – Edit Existing Organization

5. When complete click **Save**.

Note: Unlike the Interview Mode, the DTA is not given the option to cascade the common data to subsequently added suborgs in the Edit Mode. The edited / changed data will not cascade to existing suborgs, or added suborgs. DTA could return to the Interview Mode to indicate using the data in suborgs, and create them there. (Section 1.3.1)

1.9.1.3 Delete an Org

1. Log on to the user **Welcome** screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Interview** from the drop-down list.
4. If user has access to multiple orgs, select the appropriate org from the **Organization** drop-down list.
5. Select **Edit Mode** from the sub-navigation bar.
6. Select the org or suborg for deletion from the right side of the screen (Figure 122).

Figure 122: Edit Mode—Organization Screen

7. Select **Delete Organization** from the left side of the screen (Figure 123).

Figure 123: Edit Mode—Delete Organization Link

Note: The Delete Organization link will not display if the org for deletion has any elements (orgs, DTAs, groups, routing lists, ROs, LOAs) associated with it.

1.9.2 Administrator

The Administrator tab is used to create, view and delete DTAs. Administrators will create DTAs to build org structure, accept self-registration, and/or complete lines of accounting. Viewing allows a DTA to edit privileges and change the delegated org (Figure 124).
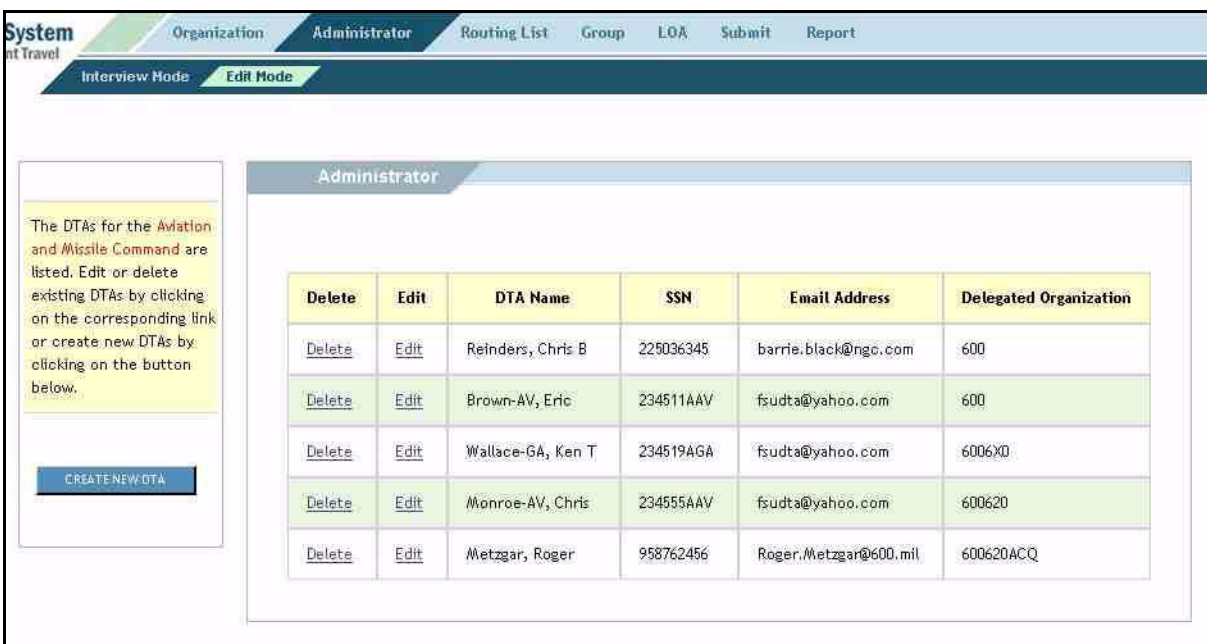
Figure 124: Edit Mode – Administrator

1.9.2.1 Create New DTA in Edit Mode

1. Use Attachment C—Create a New DTA to gather the necessary data.
2. Log on to the **Site Setup Interview** Mode
3. Click **Administrator** from the navigation bar
4. Click **Edit Mode** from the submenu of the navigation bar
5. Click the **Create New DTA** button on left of screen (Figure 124).

6. Enter the DTA's SSN. If they already have a Staging Deployment Tools profile, you will receive a message that the SSN already exists. Enter new figure here showing already exists (Figure 125).

Figure 125: DTA SSN Already Assigned

7. Click the **Add** button.

8. Enter the name and e-mail from the worksheet, grant the Deployment Tools privileges for the DTA, edit privileges as necessary for the DTA, and assign the suborg to which the DTA should be designated (Figure 126).

Figure 126: Edit Mode – Create New DTA Data

9. Click **Save**.

   Note: Providing org privileges provides Self-Registration Admin access. This should not be used except as explained in 1.5.

1.9.2.2 Edit Existing DTA

1. Log on to the **Site Setup Interview** Mode.
2. Click **Administrator** from the navigation bar.
3. Click **Edit Mode** from the submenu of the navigation bar.

4. Select the **Edit** link next to the name of the desired DTA (Figure 127).

Figure 127: Edit DTA Screen

5. Edit the necessary fields for the DTA. You cannot change the SSN (Figure 128).

Figure 128: Edit Mode – Edit Existing DTA

1.9.2.3 Delete Existing DTA

1. Log on to the **Site Setup Interview** Mode
2. Click **Administrator** from the navigation bar
3. Click **Edit Mode** from the submenu of the navigation bar

4. Select the **Delete** link next to the name of the desired DTA (Figure 129).
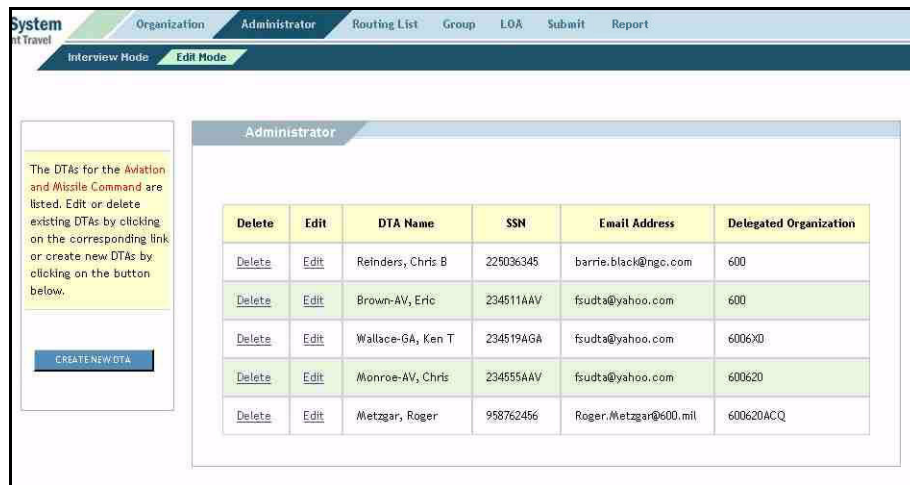
Figure 129: Edit Mode – Delete DTA from Site Setup Interview / Deployment Tools

> **Note**: By clicking on the Delete link next to a specific DTA, you remove
> the DTA from the Deployment Tools and they cannot access Site Setup
> Interview to the org's data. If a DTA is deleted they can still log onto DTS
> using their Production profile or complete Self-Registration.

1.9.3 Routing Lists

The next tab you can view in the Edit Mode is Routing Lists. This is where you can create, edit, or
delete routing lists. The DTA can also add or delete ROs and routing list details.

 In the workspace the DTA has the ability to:

- Add a routing list to the current org (Section 1.9.3.1)
- Edit the current selected routing list (Section 1.9.3.2)
- Delete the current selected routing list (Section 1.9.3.3)
- Add ROs to the for the current org (Section 1.9.3.4)
- Edit existing ROs in the current org (Section 1.9.3.5)
- Edit the current selected routing list details (Section 1.9.3.6)
- Set a routing list to the default routing list (Section 1.9.3.7)
- Upload routing list(s) from spreadsheet (Section 1.9.3.8)
- Upload routing list details from spreadsheet (Section 1.9.3.9)

1.9.3.1 Add a New Routing List Name

1. Log on to the **Site Setup Interview** Mode
2. Click **Routing List** from the navigation bar

3. Click **Edit Mode** from the submenu of the navigation bar (Figure 130).
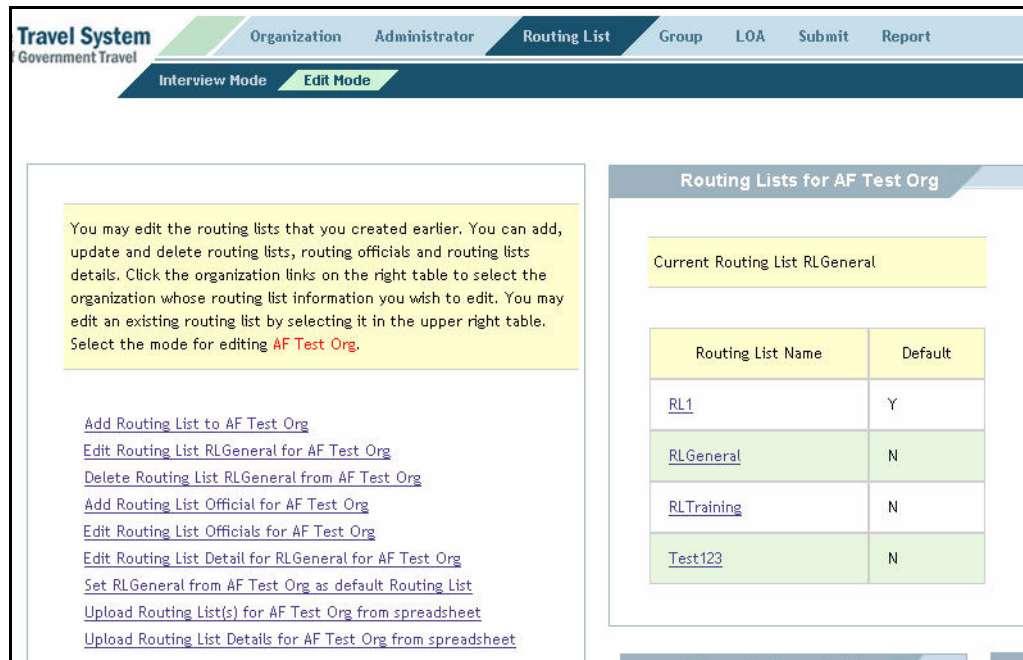
Figure 130: Edit Mode – Routing List Functions

The screen opens pre-populated to the highest org the DTA has org privileges to access in the Deployment Tool (Section 1.3.2).

In the middle of the screen, lower block, is indicated the Current Organization box and below that the current org's existing suborgs' box. Immediately above that are the routing lists that exist in the Deployment Tools for the current org. The right side of the display indicates the parent org of the current org. The links to the parent and suborgs are used to navigate up or down an org hierarchy. If a parent or suborg is clicked, then the screen refreshes with the routing lists and updated links on the left side.

The left side is the workspace on the screen. It is populated with links for each action related to the routing list at the top. To refresh the screen for another routing list in the current org, click the link.

4. Select the org to which you want to add the routing list. This will change the org links available to select from in the box. The DTA must make sure that he or she is in the correct current org.

5. Click the **Add Routing List for *desired organization*** link (Figure 131).

Figure 131: Edit Mode – Routing List Functions

6. Enter the name of the routing list and indicate whether it is available for suborgs (Figure 132).

Figure 132: Edit Mode – Add New Routing List

7. Click **Save**.

1.9.3.2 Edit Routing List Name

1. Log on to the **Site Setup Interview** Mode
2. Click **Routing List** from the navigation bar
3. Click **Edit Mode** from the submenu of the navigation bar
4. Select the org you want to edit the routing list for from the right of the screen. Once the org is selected, click on the routing list name to be edited (Figure 133).

Figure 133: Edit Routing List Screen

5. Click the Edit Routing List for *desired organization* link.

6. Edit the name of the Routing List and whether suborgs should receive this edited routing list (Figure 134).

Figure 134: Edit Mode – Edit Existing Routing List

1.9.3.3 Delete Routing List

1. Log on to the **Site Setup Interview** Mode
2. Click **Routing List** from the navigation bar
3. Click **Edit Mode** from the submenu of the navigation bar

4. Select the org from which you want to delete the routing list. This will change the links available to select from in the box. The DTA needs to ensure he or she is in the correct current org (Figure 135).

Figure 135: Delete Routing List Screen

5. Click the **Delete Routing List for *desired organization*** link.

1.9.3.4 Add RO

1. Log on to the **Site Setup Interview** Mode
2. Click **Routing List** from the navigation bar
3. Click **Edit Mode** from the submenu of the navigation bar
4. Select the org to which you want to add the RO. This will change the org links available to select from in the box. The DTA needs to make sure he or she is adding the official into the correct current org (Figure 135).
5. Click the **Add Routing List Official for *desired organization*** link.

6. Enter the SSN of the RO (Figure 136).

Figure 136: Edit Mode – Add New Routing Official SSN

7. Click **Search**. If the RO already has a Production Profile then they do not need to be added to the RO list. If the RO already has a Staging Profile, the user will receive a message indicating that the profile already exists (Figure 137). If the user is listed in staging and in a different root org then the DTA will not be able to use that person when building a routing list. In order to use that RO the person must be migrated into Production.

Figure 137: Routing List Official SSN Already Exists in Staging Screen

8. Select the name of the Official.

1.9.3.5 Edit ROs

1. Log on to the **Site Setup Interview** Mode
2. Click **Routing List** from the navigation bar
3. Click **Edit Mode** from the submenu of the navigation bar

4. Select the org you want to add the RO to from the right of the screen. This will change the org links available to select from in the box. The DTA needs to make sure they are adding the official into the correct current org (Figure 138).

Figure 138: Edit Mode – Routing List Functions

5. Click the **Edit Routing List Officials for *desired organization*** link.

6. Select the name link for the official desired and make necessary edits (Figure 139).

Figure 139: Edit Routing List Official Screen

7. To delete an RO, click **Delete** in the Delete column to the left of the official's name. **Warning:** There is no confirmation of this action. There is no Delete link available next to an RO who has been assigned a stamp in a routing list. The user must first remove the official from all routing lists before the RO can be deleted.

1.9.3.6 Edit Routing List Details

1. Log on to the **Site Setup Interview** Mode
2. Click **Routing List** from the navigation bar
3. Click **Edit Mode** from the submenu of the navigation bar

4. Select the org you want to add the routing list detail for from the right of the screen. This will change the org routing list links available to select from in the box. The DTA needs to ensure they are editing the correct org routing list details (Figure 140).

Figure 140: Add Routing List Detail for Organization Screen

5. Click the **Edit Routing List Detail for *desired organization*** link.

6. Click the magnifying glass icon to search for the RO necessary for this step (for next four steps see Figure 141).

Figure 141: Edit Mode – Edit Routing List Details

7. Select the **Document Type** that will route on this routing list.
8. Select the **Document Status** stamp for this RO.
9. Select the **Level** this step should be placed in the routing list.
10. Select the **Process Name** only if the step is conditional.

1.9.3.7 Set a Routing List to the Default Routing List

1. Login to the user **Welcome** screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Interview** from the drop-down list.
4. If the user has access to multiple orgs, click the **Organization** drop-down arrow to select the appropriate org.
5. Click **Routing List** from the navigation bar.
6. Click **Edit Mode** from the submenu of the navigation bar.
7. Select the routing list you want to name as the default routing list from the Routing List Name column on the right of the screen.

8. Select the **Set** *(desired routing list)* **as default Routing List** link from the left side of the screen. Notice that the **N** in the Default column to the right of the Routing List Name changes to **Y** (Figure 142).

Figure 142: Set Routing List Name to Default Routing List

1.9.3.8 Upload Routing List(s) from Spreadsheet

1. Login to the user **Welcome** screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Interview** from the drop-down list.
4. If the user has access to multiple orgs, click the **Organization** drop-down arrow to select the appropriate org.
5. Click **Routing List** from the navigation bar.
6. Click **Edit Mode** from the submenu of the navigation bar.
7. Select the **Upload Routing List(s) for** *(desired Organization)* **from spreadsheet** link.

8. Click **Browse** to locate the saved Excel spreadsheet for upload to DTS (Figure 143).

Figure 143: Upload Routing List Screen

9. Click **UPLOAD**.
10. An Upload Report screen will display the number of routing lists that were inserted into the org upon upload and how many were rejected. (Section 1.4.3.1 for more details.)

1.9.3.9 Upload Routing List Details from Spreadsheet

1. Login to the user **Welcome** screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Interview** from the drop-down list.
4. If the user has access to multiple orgs, click the **Organization** drop-down arrow to select the appropriate org. Click **Routing List** from the navigation bar.
5. Click **Edit Mode** from the submenu of the navigation bar.
6. Select the **Upload Routing List Details for** *(desired Organization)* **from spreadsheet** link.

7. Click **Browse** to locate the saved Excel spreadsheet for upload to DTS (Figure 144).

Figure 144: Upload Routing List(s) Detail Screen

> **Note**: Click the **Add Routing Officials** link to add ROs one at a time. (Section 1.9.3.2 for more details.)

8. Click **UPLOAD**.
9. An Upload Report screen will display the number of routing lists details that were inserted into the org upon upload and how many were rejected. (Section 1.4.3.3 for more details.)

1.9.4 Groups

The Groups tab is where a DTA can create or delete groups and edit global group membership rules (GGMR).

In the Group workspace the DTA has the ability to:

- Edit the current org's group (Section 1.9.4.1)
- Delete the current selected group (Section 1.9.4.2)

1.9.4.1 Edit a Group

1. Log on to the **Site Setup Interview** Mode.
2. Click **Groups** from the navigation bar.
3. Click **Edit Mode** from the submenu of the navigation bar. The screen opens pre-populated to Current Organization; the highest org the DTA has org privileges to access inn Deployment Tools (Section 1.3.2) (Figure 145).

On the lower right side of the screen the Current Organization is indicated and below the current org are existing suborgs. Immediately above that is the Parent Organization of the

current org. The links to the parent and suborgs are used to navigate up or down an org hierarchy. If a parent or suborg is clicked, then the screen refreshes the left side for the current org.

The left side is the workspace on the screen. It is populated with current org's group, two functions – Edit and Delete (for the current org's group), the global group membership rule (GGMR) for the current org, and followed by a list of other orgs that have the current org's group in their GGMR.

4. Click **Edit Group**. The Edit Group Structure screen will open (Figure 145).

Figure 145: Edit Groups Screen

5. Edit the Group Name if desired (Figure 146).

Figure 146: Edit Mode – Edit Group Structure

6. Check the box(es) if you want that global group membership rule to apply to your org.
7. Click the **Yes** radio button to cascade Global Group Membership Rule(s) to lower-level orgs. Click the **No** radio button if you do not want to allow lower-level orgs to become members of this group.
8. Click **Save**.

    Note: GGMRs may only be created for groups named within the root org. The group added may only go as high as the root org. If groups are needed above the root org (i.e. Service or Agency groups, Major command groups, etc.), they may be added using the DTA Maintenance Tool post-migration from Staging to Production. (Section 1.8.1)

1.9.4.2 Delete a Group

1. Log on to the **Site Setup Interview** Mode.
2. Click **Groups** from the navigation bar.
3. Click **Edit Mode** from the submenu of the navigation bar. The screen opens pre-populated to Current Organization; the highest org the DTA has org privileges to access in the Deployment Tool (Section 1.3.2) (Figure 145). Ensure the correct org's groups are being displayed.

4. Click **Delete Group**. Deleting a group that is used for GGMR for other orgs will delete the rules for all orgs using that group. In other words the group will not exist for any org (Figure 147).

Figure 147: Edit Mode – Delete Group and Reset GGMR

1.9.5 Lines of Accounting (LOA)

The LOA tab of the Edit Mode is where the DTA can create or edit lines of accounting for an org hierarchy.

In the Group workspace the DTA has the ability to:

- Manually create a new LOA (Section 1.9.5.1)
- Upload LOAs from a spreadsheet (Section 1.9.5.2)
- Copy existing LOAs (Section 1.9.5.3)

1.9.5.1 Manually Create New LOA

The DTA uses this function to manually enter a single new LOA. The DTA needs to make sure they are in the correct current org.

1. Log on to the **Site Setup Interview** Mode.
2. Click **LOA** from the navigation bar.
3. Click **Edit Mode** from the submenu of the navigation bar.

4. Select the org to which you want to add the LOA. This will change the org links available to select from in the box. The DTA needs to make sure he or she is adding the LOAs into the correct current org (Figure 148).

Figure 148: Edit Mode for LOAs

5. Click the **Create New LOAs** link.
6. Select the format map from the pull down and continue (Figure 149).

Figure 149: Create LOA Screen

7. Enter the empty budget shell fiscal year, LOA fiscal year, LOA name, and LOA data elements (Figure 150).

Figure 150: Edit Mode – LOA Data Elements

Note: Do not include the fiscal year in the LOA name, i.e., LOA Name = TRANING not 04 TRAINING. The first two digits of the label are set to the FY automatically.

1.9.5.2 Upload LOAs

The DTA uses this function to bulk upload LOAs from a spreadsheet. The DTA needs to make sure the LOAs are being uploaded to the correct current org.

1. Log on to the **Site Setup Interview** Mode.
2. Click **LOA** from the navigation bar.

3. Select the proper Format Map to enter your lines of accounting. Save the file to your desktop (Figure 151).

Figure 151: Site Setup Interview LOA Screen

4. Click **Edit Mode** from the submenu of the navigation bar.

5. Select the org to which you want to add the LOA. This will change the org links available to select from in the box (Figure 152).

Figure 152: Edit Mode – Edit LOAs

6. Select **Upload LOA from Excel spreadsheet** link (for the current org).
7. Select the proper **Format Map** from the drop-down list (Figure 153).

Figure 153: Edit Mode – Obtain LOA Excel Spreadsheet Format

8. Click the **Browse** button. Browse for and select the Excel File previously downloaded to your desktop (Figure 154).
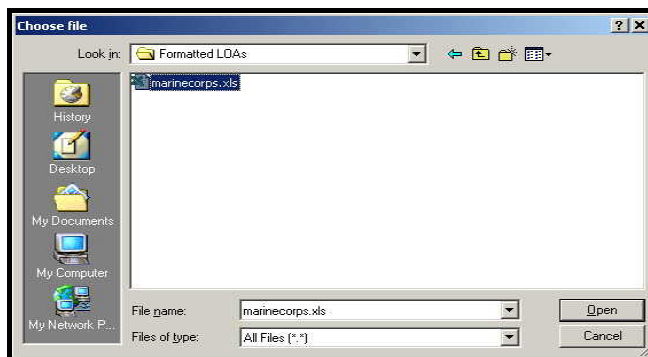
Figure 154: Browse for LOA Excel file

9. Click **Upload**. The Upload Report screen will open (Figure 155).

Figure 155: Edit Mode – Select LOA File and Upload

1.9.5.3 Copying LOAs

The DTA uses this function to copy existing LOAs from the current org to one or more suborgs. The DTA needs to make sure they are in the correct current org.

1. Copy LOAs to suborgs
2. Log on to the **Site Setup Interview** Mode
3. Click **LOA** from the navigation bar.
4. Click **Edit Mode** from the submenu of the navigation bar.
5. Select **Copy LOAs from Current Organization to its Sub-Organizations** link. The LOA Edit Mode screen opens with populated to the Current Organization, the highest org the DTA has LOA privileges to access in the Deployment Tool (Section 1.3.2) (Figure 156).

Figure 156: Edit Mode for LOAs

6. Select the existing **LOA(s)** label already created for the current org from the top part of the screen; then select the **Sub-Organizations** you want to copy from the lower part of the screen (Figure 157).

Figure 157: Copy LOA Screen

7. Click the **Copy** button.
8. View the Copy LOA Report Screen.

    Note: Budget shells with the same label name and data elements as the LOA are not created until migration is approved (Section 1.7.2).

1.10 Reports

Deployment Tool reporting functionality monitors and creates reports on the Organization Totals, Site/Org Setup Progress, and the Self Registration progress in DTS. Permission level 7 and the necessary org access is required for the Reports link to display on the user's navigation bar.

Each report allows the user to enter specific search criteria that will limit the search results to only desired information. Document information is available in DTS for reporting within the last 15 months. The reports are available for download in Comma Separated Values (.csv) format and require Microsoft Excel to be installed.

1.10.1 Summary of Reports

Users with permission level 7 and appropriate org access can access the following reports:

1. Organization Totals:
    *   The date the report was run.
    *   The search criteria used to generate the report (Site Name and Organization. Include
    *   Sub-Organizations is either Y (yes) or N (no)).
    *   Organizations/Sub-Organizations: number of orgs and suborgs created to date.
    *   Total Sub-Organizations: number of suborgs created to date.
    *   Total Routing Lists: total number of routing lists created to date.
    *   Total Groups: total number of groups created to date.
    *   Total LOAs: total number of LOAs created to date.

2. Site/Org Setup Progress:
The Site Organization Setup Progress report displays the following information:

    *   The date the report was run.
    *   The search criteria used to generate the report (Site Name, Organization, Service/Agency,
    *   and Organization Status. Include Sub-Organizations is either Y (yes) or N (no)).
    *   Routing List Names
    *   Groups
    *   LOA Label
    *   LOA 10 X 20
    *   Organization Status
    *   Percent Organization Complete
    *   Organization Complete (Y/N)

3. Self-Registration Metrics:

    *   Current Date
    *   Site Name
    *   Organization/ Sub-Organization
    *   DTS Organization Description
    *   Traveler SSN (Last 4 digits)
    *   Traveler Last Name
    *   Traveler First Name
    *   E-mail Address
    *   Status (Submitted, Self-Registration, Awaiting Approval or Incomplete Self-Registration)
    *   Status Age
    *   Create Date
    *   Submit Date

1.10.2 Organization Totals Report

The Organization Totals Report provides the user with a running count of the total number of orgs and suborgs, routing lists, groups, and LOAs created.

The Organization Totals Report displays the following information:

- The date the report was run.
- The search criteria used to generate the report (Site Name and Organization. Include
- Sub-Organizations is either Y (yes) or N (no)).
- Organizations/Sub-Organizations: number of orgs and suborgs created to date.
- Total Sub-Organizations: number of suborgs created to date.
- Total Routing Lists: total number of routing lists created to date.
- Total Groups: total number of groups created to date.
- Total LOAs: total number of LOAs created to date.

To create an Organization Totals Report:

1. Login to user Welcome screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Admin** from the drop-down list (Figure 158).
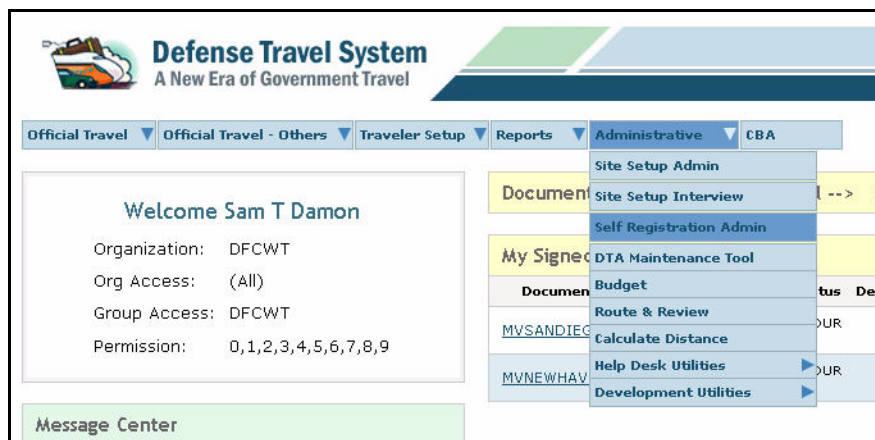
Figure 158: Site Setup Admin-Welcome Screen

4. Select **Reports** from the top navigation bar.
5. If the user has access to multiple orgs, click the **Organization** drop-down arrow to select the necessary org to be edited. The menu includes all orgs to which the user has been specifically delegated as the DTA and orgs to which the user has org access.
6. Click **Reports** from the top navigation bar.

7. Select **Organization Totals** from the sub-navigation bar (Figure 159). For a description of the Organization Totals Report fields, see Table 1.

Figure 159: Organization Totals Report

Table 1: Organization Totals Report

Field Name	Description
Site Name	To restrict your results to one site, select the Site Name from the drop-down; or leave blank to return all results.
Organization	Select the Organization to be included in the report. Select the Sub-Organizations check box to search the lower-level orgs.

Note: This report is not available in Site Setup Interview.

8. Once the desired fields are selected click **Generate Report**. This creates a .csv (comma separated value) report displays in an Excel spreadsheet.

9. On the File Download dialog box, click **Open** to open the Excel report, click **Save** to save the report to your hard drive, or click **Cancel** to close the report. Click **More Info** to get help on downloading files (Figure 160).
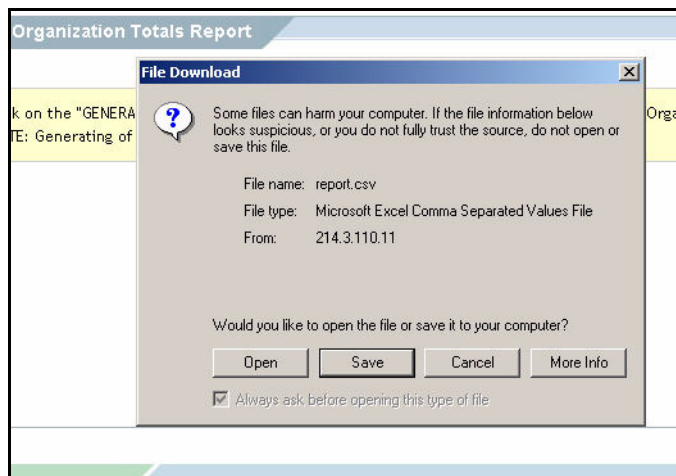
Figure 160: File Download Dialog Box

10. Preview the Organization Totals Report (Figure 161).

Figure 161: Organization Totals Report

1.10.3 Site/Organization Setup Progress Report

The Site Organization Setup Progress Report allows the user to check the status of the administrative setup for a site, to monitor the site progress and preparedness for upload, LPV, and IOC. Permission level 7 DTA's, can run this report for all orgs at the site selected that fall within their org access level for their org of assignment.

The Site Organization Setup Progress displays the following information:

- The Site Organization Setup Progress report displays the following information:
- The date the report was run
- The search criteria used to generate the report (Site Name, Organization, Service/Agency, and Organization Status. Include Sub-Organizations is either Y (yes) or N (no)).
- Routing List Names
- Groups
- LOA Label
- LOA 10 X 20
- Organization Status
- % Organization Complete
- Organization Complete (Y/N)

To create a Site/Organization Setup Progress Report:

1. Login to the user Welcome screen.
2. Select **Administrative** from the navigation bar.
3. Select **Site Setup Admin** from the drop-down list.
4. If the user has access to multiple orgs, click the **Organization** drop-down arrow to select the necessary org to be edited. The menu includes all orgs to which the user has been specifically delegated as the DTA and orgs to which the user has org access.
5. Click the **Organization** drop-down arrow to select the necessary org to be reported on from Site Setup. The menu includes all orgs to which the user has been specifically delegated as the DTA and those orgs to which the user has org. access.
6. Click **Reports** from the top navigation bar (Figure 162).

Figure 162: Site/Organization Setup Progress Report Screen

7. Select **Site/Organization Setup Progress Totals Report** link from the sub-navigation bar. For a description of the Organization Totals Report fields, see Table 2.
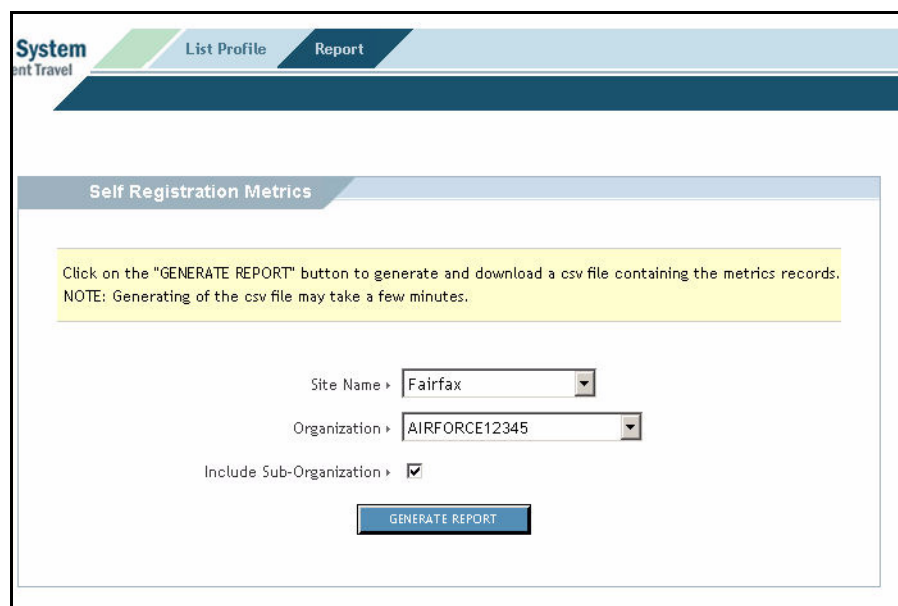
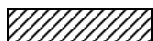*Table 2: Site/Organization Setup Progress Report*

Field Name	Description
Site Name	To restrict your results to one site, select the Site Name from the drop-down list; or leave blank to return all results.
Service/Agency	To restrict your results to one service or agency, select it from the drop-down list; or leave blank to return all results.
Organization Status	Process, select it from the drop-down list; or leave blank to return all results. The statuses are: Organization Created; LDTA Created; Submitted; Approved; Rejected; Migrated; or Migration Failed.
Organization	Select the Organization to be included in the report. Select the Sub-Organization check box to include sub-orgs.

Note: In Site Setup Interview, the Site/Organization Setup Progress Report only has three fields: Organization Status and Organization, which use the same description as above.

8. Once the desired fields are selected click **Generate Report**. This creates a.csv (comma separated value) report that displays in an Excel spreadsheet that opens in a separate screen.
9. On the File Download dialog box, click **Open** to open the Excel report, click **Save** to save the report to your hard drive, or click **Cancel** to close the report. Click **More Info** to get help on downloading files.

10. Preview the Site/Organization Setup Progress Report (Figure 163).

Figure 163: Site/Organization Setup Progress Report Screen

1.10.4 Self-Registration Metrics Report

The Self-Registration Metrics Report monitors time spent by self registering users in varying states of Self-Registration to track how long registrants have stayed in each state, e.g. Submitted, Self-Registration, Awaiting Approval or Incomplete Self-Registration.

The Self-Registration Metrics Report displays the following information:

- Current Date
- Site Name
- Organization/ Sub-Organization
- DTS Organization Description
- Traveler SSN (Last 4 digits)
- Traveler Last Name
- Traveler First Name
- E-mail Address
- Status (Submitted, Self-Registration, Awaiting Approval or Incomplete Self-Registration)
- Status Age
- Create Date
- Submit Date

To create a Self-Registration Metrics Report:

1. Login to user Welcome screen.
2. Select **Administrative** from the navigation bar.
3. Select **Self Registration Admin** from the drop-down list (Figure 164).

Figure 164: Welcome Screen

4. If the user has access to multiple orgs, click the **Organization** drop-down arrow to select the necessary org to be edited. The menu includes all orgs to which the user has been specifically delegated as the DTA and orgs to which the user has org access.Click **Reports** from the top navigation bar.
5. Select **Self-Registration Metrics Report** link from the sub navigation bar (Figure 165). For a description of the Organization Totals Report fields, see Table 3.

Figure 165: Self-Registration Metrics Report

Table 3: Self-Registration Metrics Report

Field Name	Description
Site Name	To restrict your results to one site, select the Site Name from the drop-down; or leave blank to return all results.
Organization	Select the org to be included in the report. Select the Sub-Organizations check box to search the lower-level orgs.

6. Once the desired fields are selected, click **Generate Report**. This creates a .csv (comma separated value) report that displays in an Excel spreadsheet.
7. On the File Download dialog box, click **Open** to open the Excel report, click **Save** to save the report to your hard drive, or click **Cancel** to close the report. Click **More Info** to get help on downloading files.
8. Preview the Site/Organization Setup Progress Report (Figure 166).

Figure 166: Self-Registration Metrics Report
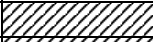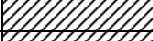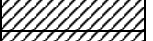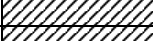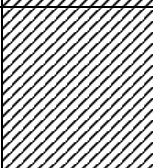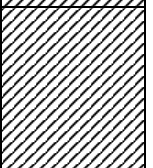
Attachment 1: Roadmap for S/A Reps

////////	= Mandatory

Create New Site

Field		Requirement	
Administrative	////////	Tool Bar Selection	////////
Site Setup Admin	////////	Drop Down	////////
Site List	////////	Tool Bar Selection	////////
Does site exist in list?	////////	If yes, click site name and go to Create Root Organization	////////
	////////	If no click create new site	////////
Create New Site			
Site Name	////////	Mandatory, All CAPS	////////
State/Country Search	////////	Mandatory	////////
Type		Default is **ALL**	
CONUS/OCONUS		Default is **ALL**	
State/Country	////////	State/Country 2 letter code or Name	////////
Create Site	////////	Click Create Site Button	////////
Do you want to create another site?	////////	YES or NO (If yes, repeat Create New Site)	////////
Sites	////////	Select site created and go to create root organization	////////

Create Root Organization

Field		Requirement	
Site Setup Admin	////////	Drop Down	////////
Sites	////////	Select site name from list	////////
Root Organization	////////	Select create new root organization	////////
Site Name		Pre-Populates from site list	
Service/Agency	////////	Select from List	////////
DTS Organization Code	////////	Mandatory	////////
DTS Organization Description	////////	Mandatory	////////
DTA ID	////////	Mandatory enter reject email	////////
GDS	////////	Mandatory Select GDS from list or CTO Disabled if not CTO connected	////////
Is Active GDS selected?	////////	Select PCC, Ticket PCC from list, and enter Company Code (Obtain correct Company Code from CTO)	////////

Office Address 1	/////	**Mandatory**	/////
Office Address 2		Optional	
Office City	/////	**Mandatory**	/////
Office State	/////	**Click icon and select**	/////
State/Country Search			
Type		Default is **ALL**	
CONUS/OCONUS		Default is **ALL**	
Code/Name	/////	**State/Country 2 letter code or name**	/////
Zip Code	/////	**Mandatory**	/////
Mail Code		Optional	
Time Zone	/////	**Mandatory**	/////
Organization Email Address	/////	**Mandatory (This is email used when someone is self registering)**	/////
Present Duty Station Name		Optional	
Number of Work Hours/Day		Optional	
Emergency Contact Name	/////	**Mandatory** **Duty Station name**	/////
Emergency Contact Phone	/////	**Mandatory** **Duty Station phone**	/////
Number of Miles to Closest Airport from office		Optional	
Office Phone Number	/////	**Mandatory**	/////
Office Fax		Optional	
Unit ID (UIC/RUC/Passcode)	/////	**Mandatory**	/////
Email Notification		Default in **On**	
	/////	**Click SAVE (Go to Create New DTA)**	/////

Create New LDTA

Field		Requirement	
Root Organization	/////	**Click Create Lead DTA**	/////
SSN	/////	**Enter LDTA SSN and click ADD**	/////
Last Name	/////	**Mandatory (as it appears on digital certificate**	/////
First Name	/////	**Mandatory**	/////
Middle Initial		Optional	
Email	/////	**Mandatory**	/////
Organization		Pre-populated	
DTA Privileges*		Answer **YES** or **NO** for user to update: Organization, Group, Route and LOA	
		Click SAVE	

* A Lead DTA should have all privileges. ODTAs may have all or may have less depending on the role in setup. For example, an ODTA may choose not to have LOA if that organization plans to use a Finance DTA to do the LOA portion of setup.

Attachment A: New Site/Root Organization Worksheet

New Site:

Site Name	
State	
Country	

Root Organization:

Site Name	
Service/Agency	
Root Organization Code	
DTA ID	
GDS	
Company Profile	
Office Address	
Office City	
Office State	
Office Zip/Postal Code	
Mail Code	
Time Zone	
Organization Email Address	
Present Duty Station Name	
Number of Work Hours/Day	
Emergency Contact name	
Emergency Contact Phone	
Number of Miles to Closest Airport from Office	
Office Phone Number	
Office Fax Number	
Unit ID/UIC/RUC/Passcode	
Email Notification – On or Off	

Attachment B: Create Organization Worksheet

Site Name	
Service/Agency	
Root Organization Code	
DTS Organization Description	
DTA ID	
GDS	
Company Profile	
Office Address	
Office City	
Office State	
Office Zip/Postal Code	
Mail Code	
Time Zone	
Organization Email Address	
Present Duty Station Name	
Number of Work Hours/Day	
Emergency Contact name	
Emergency Contact Phone	
Number of Miles to Closest Airport from Office	
Office Phone Number	
Office Fax Number	
Unit ID/UIC/RUC/Passcode	
Email Notification – On or Off	

Attachment C: Create New DTA Worksheet

Part One for Deployment Tool/STAGE Use

SSN	
Last Name	
First Name	
Middle Initial	
Email Address	
Sub-Organization	
Privileges*	Answer Yes or No for user to Update: Organization, Group, Route and LOA

* A Lead DTA should have all privileges in STAGE. ODTAs may have all or may have less depending on the role in setup. For example, an ODTA may choose not to have an LOA if that organization plans to use a Finance DTA to do the LOA portion of setup.

Part Two for Self Registration Acceptance into Production
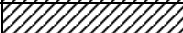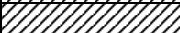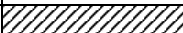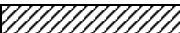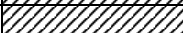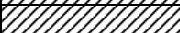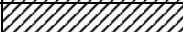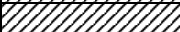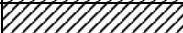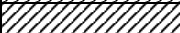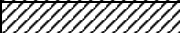
Name	
SSN	
Production Permission Level	
Production Organization Access	
Production Group Access	
Routing List*	
Default LOA**	

* Optional – Defaults based on organization setting
** Optional

Attachment D: Road Map for Self-Registration Data

Recommended Information

General Information	Requirement	
First Name	Pre-populated (CAC)	
Last Name	Pre-populated (CAC)	
Middle Initial	Optional	
SSN	**Mandatory**	
Gender	*Default is NA*	
Email Address	**Mandatory**	
Mailing Address		
Street, City, State, and Zip/Postal Code	**Mandatory**	
Residence info same as Mailing address?	*Default is NO*	
	YES populates residence with mailing info	
Required Work Information		
Civilian/Military	*Default is CIV*	
Title/Rank	**Pull Down**	
Work Hours	Pre-populated	
Tech Status	*Default is NO*	
Organization	**Mandatory**	
Service/Agency	**Select in List**	
Type	**Select in List**	
State	**Select in List**	
Site	**Select in List**	
Org	**Select in List**	
Office Address, City, State and Zip Postal Code	Pre-populated	
Time Zone	Pre-populated	
Work Hours	Pre-populated	
Emergency Contact Name and Phone Number	Pre-populated	
Electronic Funds Transfer Data		
Account Type – Checking or Saving	Highly Recommended	
Account Routing Number	Highly Recommended	
Account Number	Highly Recommended	
Government Charge Card (GOVCC)		
Charge Card Status	Highly Recommended	
Account Number (if cardholder)	Highly Recommended	
GOVCC Exp. Date (if cardholder)	Highly Recommended	
Preference Information		
Printed Organization	Pre-populated	
Present Duty Station	Pre-populated	
Miles from Office to Airport	Pre-populated	
Office Phone	Pre-populated	
Office Fax	Pre-populated	
Office Mail Stop	Pre-populated	
Organization Email	Pre-populated	
Unit ID (UIC/RUC/PASSCODE)	Pre-populated	
Foreign Travel Information		
Passport Information		
First Name	Optional	

Last Name	Optional
Middle Initial	Optional
Birth Date	Optional
Passport Number	Optional
Issuing City	Optional
Expiration Date	Optional

Preference Information

Root Organization	Requirement
Street, City, State, and Zip/Postal Code	Pre-populated from Recommended info entry
Miles from Home to Airport	Optional
Residence Phone	**Mandatory**
Residence Fax	Optional
Air Travel Preferences	
Airport	Optional
Preferred Seating	Optional
Special Meals	Optional
Special Needs	Optional
Frequent Flyer	Optional
Lodging Preferences	
Preferred Lodging	Optional
Lodging Special Needs	Optional
Rental Car Preferences	
Preferred Rental Car	Optional
Rental Car Special Needs	Optional
Personal Remarks	Optional
Smoking Preferences	
Smoker	*Default is* **NO**

Attachment E: Worksheet for Self-Registration

General Information	
First Name	
Last Name	
Middle Initial	
SSN	
Gender	
Email Address	
Mailing Address	
Mailing Address, City, State and Zip/Postal Code	
Required Work Information	
Civilian/Military Status	
Title/Rank	
Tech Status	
Organization Name	
Office Address, City, State and Zip/Postal Code	
Time Zone	
Work Hours	
Emergency Contact Name and Phone Number	
Electronic Funds Transfer Data	
Account Type – Checking or Saving	
Account Routing Number	
Account Number	
Account Number	
Government Charge Card (GOVCC)	
Charge Card Status	
Account Number	
GOVCC Exp. Date	
Optional Work Information	
Printed Organization	
Present Duty Station	
Miles from Office to Airport	
Office Phone	
Office Fax	
Office Mail Stop	
Foreign Travel Information	
First Name	
Last Name	
Middle Initial	
Birth Date	
Passport Number	
Issuing City	
Issuing State	
Expiration Date	

Attachment F - Self-Registration Screen Shots

Self-Registration Tool Welcome Page

Recommended Information

Recommended Information Continued

Recommended Information Continued

Preference Information

Preference Information Continued

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